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NASFAA Training Survey: Training Needs of the Profession

by Karen L. Pennell and Donald R. Ryan

The 1983-84 NASFAA Committee on Training distributed a survey to all state and regional presidents in the Fall of 1983 to collect information regarding past, present and future training activities throughout the country. The purpose of the survey was to assess current training needs on state and regional levels and to discover ways in which NASFAA could assist in future training efforts. In 1982, NASFAA formally adopted a position on training which stated: "Training is most effective when conducted through state and regional associations". The position on training further defined NASFAA's role in training and stated it should continue to develop and/or make available training materials to those state and regional associations that request materials to compliment their training activities. With the termination of the National Training Project through the consortium of NASFAA, NACUBO, and APGA, which had been funded through the Department of Education, it was imperative that aid officers review their training needs and communicate to NASFAA how it could best assist them.

Federal funding for states to develop training materials was provided through Section 493C of the Education Amendments of 1976. Section 493C of the amendments stated: "It is the purpose of this section to make incentive grants available to the states . . . for the purpose of designing and developing programs to increase the proficiency of institutional and state financial aid administrators in all aspects of student financial aid." Many innovative approaches to the training of financial aid administrators and staff were carried out through these 493C projects. When funding was not continued through the Education Amendments of 1980, most of the states' training efforts were terminated. The National Training Project of the Consortium (NASFAA, MACUBO, APGA) funded by the Department of Education was able at that time to meet many of the training needs of the states. With the termination of the National Training Project in 1984, it now appears that the training needs of our profession must be provided by NASFAA.

The findings reported in this article were gathered by using a survey instrument developed by Mary Lou Hildebrant, Chairman of the Training Committee, with the assistance of the full committee. The survey was distributed to fifty state presidents and six regional presidents in August 1983. The mailing included a cover letter from NASFAA President Mary Haldane and NASFAA Executive Director Dr. Dallas Martin, a copy of NASFAA's position on training, and the survey instrument. Five regional presidents and thirty-two state presidents responded (66% response rate). Survey results were analyzed and ranked by frequency of response by Training Committee members.

Regional and State Association Characteristics

The survey requested demographic data information concerning the existence of formal training committees, and whether states have formal positions on training and membership information. Questions were also asked about state and regional

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associations' historical and planned future training activities. The results showed that all regional associations have formal training committees while eighty-eight percent (88%) of the state respondents indicated the presence of a training committee at the state association level. Sixty percent (60%) of the regional associations and fifty-six (56%) of the state respondents have training committees that are constitutionally required. Eighty percent (80%) of the regional associations and forty-one percent (41%) of the state respondents have a formal position on training. The majority of state (75%) and regional associations (80%) membership is on an individual basis.

Participation with Other Agencies in Training Activities

The majority of training activities at state and regional levels occur at annual conferences; however, many state agencies, service organizations (ACT/CSS) and regional offices of the Department of Education provide separate yearly training workshops. The respondents indicated that these agencies offer the following training:

ACT/CSS	Need Analysis and Form Update
Department of Education (Regional)	FISAP Workshops and Updates
State Agencies	GSL, State Grant, Voc. Rehab. Workshops

Historical Training Activities Conducted by State Associations

State associations have conducted a multitude of training workshops encompassing a wide variety of topics over the past three years. Most of the workshops were held at each state's association meeting. New Aid Officer Training ranks first as the most frequent session held, while Support Staff and High School Counselor Workshops follow two and three in rank. Fig. 1 ranks sessions by frequency. Many state associations have developed training materials to complement individual topics. Materials developed for the New Aid Officer, Support Staff and GSL Issues were mentioned most frequently by the state respondents.

Future Planned Training Activities by State Associations

The survey requested a specific listing of future planned training activities from each state. The top ten responses were as follows:

Training Workshop/Activity by Rank	# of Respondents	% of Sample
1. Novice/Beginner/New Aid Officer	15	48
2. Support Staff	14	45
3. High School Counselor	12	39
4. GSL Regulations/Update	10	32
5. Management of the Aid Office	7	23
6. Needs Analysis	6	19
7. Satisfactory Progress	5	16
8. Computerization of the Aid Office	5	16
9. Proprietary/Vo-Tech Concerns	4	13
10. Policy and Procedures Manual Preparation	3	10

Additional topics listed by the respondents included: legal aspects, professional certification, program reviews and audits, federal income tax forms, records maintenance and validation.

Figure 1
HISTORICAL LIST OF STATE ACTIVITIES DURING THE LAST THREE YEARS BY RANK

RANK	SUBJECT MATTER/WORKSHOPS	EXPERIENCE LEVEL OF TRAINING					STATE MATERIALS DEVELOPED
		ALL LEVELS	H.S. COUNS.	LESS THAN 2 YRS.	TWO TO FIVE YRS.	OVER FIVE YRS.	
1.	New Aid Officer Training			16			6
2.	Support Staff	4		8	1	1	9
3.	H. S. Counselor		13				1
4.	Needs Analysis	1		5	2	2	1
5.	Management Issues	6		2	1	2	1
6.	GSLP Issues	6		2		2	1
7.	Federal/State Leg. Updates	8					4
8.	Pell Validation	5		1			2
9.	Improving Communication Skills	5					1
10.	Policy and Procedures Manual	4				1	1
11.	Federal Income Tax Forms	4		1			3
12.	Proprietary/Non-Trad.	1		2			1
13.	Voc. Rehab. and Fin. Aid	3				1	1
14.	Satisfactory Progress	3					3
15.	Stress Management	3					
16.	Governmental Relations	2		1			
17.	Computer Literacy	2		1			
18.	Independent Student Packaging	1		1			
19.	Professional Development	2				1	1
20.	Marketing Financial Aid	1				1	1
21.	Student Relations/Counseling	1				1	1
22.	Sex Equity	2					
23.	Welfare Benefits/Fin. Aid	2					1
24.	Refunds/Repayment	1		1			1
25.	Legal Issues in Fin. Aid	1					1
26.	Loan Collections	1		1		1	1
27.	Program Reviews/Audits	1					
28.	Development of Forms	1					
29.	Scholarships/Development Office	1					
30.	Experienced Aid Officer					1	1
31.	Use of Peer Counselors	1		1			1
32.	Selective Service Registration	1					
33.	Financial Aid "Bowl"	1					

(When asked if sessions should be completed, only 5 NO answers appeared on the surveys to the following: Pell Validation, Stress Management, Independent Student Packaging and Satisfactory Progress (2 NO's).)

Training Materials Produced by NASFAA

The survey questioned if NASFAA developed training materials in the near future, what materials would state associations be interested in using for their workshops. The responses included federal updates, legislative changes, federal regulations, guides for the inexperienced aid officer, high school counselor handbooks, management guides and materials aimed at the aid officer with two to five years of experience. Ninety-four percent (94%) of the state respondents felt that they would definitely be interested in using materials produced by NASFAA in their training activities.

Comments about NASFAA's Role in Training

The overall response was favorable to NASFAA's Position on Training. The majority of respondents felt that NASFAA should provide direction and develop materials to assist state and regional associations in their training efforts. The response reaffirms NASFAA's position on training stated in its position paper dated September 1982. Respondents requested the development of additional monographs and supported continued research. It was also felt that more effort should be directed to assisting the experienced aid officer since the majority of training material and workshops are directed towards the inexperienced aid officer.

Two minority opinions were listed in the survey responses. One state felt that the federal government should provide all training and materials for financial aid administrators. It was also stated that state, regional and national associations should not be responsible for the development of materials or workshop training. Another opinion doubted that NASFAA could contribute much in training efforts because all training should be done at the state association "grass roots level."

Discussion

Participation in the survey was not one hundred percent as was hoped by the Training Committee, but the response rate (66%) was sufficient to generalize about what training materials and workshops are needed for the future. One recurring theme was apparent throughout the completed surveys: NASFAA does have a responsibility to its members to provide training materials and to assist state and regional associations in the formation of workshops. States and regions are looking to NASFAA to provide leadership in training but few, if any, have new or innovative approaches in the development of training topics or materials. One reason for this lack of innovation may be that aid officers may actually need and want repetitive workshops that are offered in needs analysis, support staff training and high school counselor concerns. The findings seem to indicate that the "old standbys" are still relevant and desired by state and regional association memberships. New aid officer training appeared to be of great concern to the majority of the respondents as a future planned activity while the same session was listed for many previous years. This may be a continuing and necessary activity for NASFAA to sponsor in the future, especially with the termination of the National Training Project.

Some of the training materials developed by states seem to replicate materials already produced by NASFAA committees and the Training Project. It appears that many aid officers do not know what materials have been produced in the past or what efforts are now being made by various NASFAA committees in the production of monographs and handbooks. The 1983-84 Training Committee assembled information about resource material available in the field and plans are being formulated to publish a Bibliography of Training Resources. The committee anticipates that the existence of a bibliography will further assist states and regional associations in their training needs so they may not feel the necessity to "re-invent

the wheel." The Encyclopedia of Financial Aid recently published by NASFAA will also assist financial aid professionals in training activities. When used in conjunction with the Federal Register and the Department of Education Handbook it will provide a much needed central resource of accurate information and guidance.

A growing concern was voiced in several surveys about the lack of training workshops and materials for the aid officer with two to five years of experience in the field. It was felt that once all beginning level training was completed, no "intermediate" level of training was available. Training activities are usually addressed to the neophyte or the expert, which leaves the intermediate aid officer either bored or confused. Workshops and materials which would instill confidence in the intermediate's abilities may be what is needed. A possible approach to answer this need would be the development of case studies detailing specific, unusual situations in the calculation of Pell Grants, office procedures/management or federal reporting. One major difference between the intermediate and the expert is the experience acquired over the years and the situations encountered in the administration of financial aid. Therefore, it might be beneficial for intermediate aid officers to understand this concept which could be reinforced in a case study workshop approach, thereby increasing their confidence level and professional expertise by this type of experience.

As a result of the termination of the National Training Project, the 1983-84 training-activities which had been previously provided through the training project. The two most important as indicated by the survey included the summer week-long training workshops for new financial aid officers and training workshops for high school counselors. The Training Committee requested and received approval from the NASFAA Council to update the curriculum for the summer workshops for new financial aid officers and to provide one camera-ready copy of the complete curriculum to each of the NASFAA regions who, in turn, were responsible for conducting workshops in each of their regions. In addition, the curriculum for high school counselor workshops was updated and one copy was provided to each of the 50 state associations who in turn would be responsible for conducting workshops in each of the states during the fall of 1984.

Summary

New Aid Officer, Support Staff and High School Counselor workshop materials must be updated and continued. Current and future training topics must be developed as well. The survey results clearly indicated that states and regions were definitely interested in using training materials produced by NASFAA. With the termination of federal funding for training and materials, first through expiration of 493C funds, and then with the discontinuance of the National Training Project, it is more imperative than ever that NASFAA provide those materials. It is difficult to anticipate the future training needs of a diverse population of financial aid administrators. There is no scientific way to predict the future or what our concerns will be in the next few years. However, it appears by the survey results that NASFAA must continue its leadership role in meeting the training needs of our profession.

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