

Journal of Student Financial Aid

Volume 2 | Issue 1

Article 3

2-1-1972

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T. D. Morris

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Recommended Citation

Morris, T. D. (1972) "A Report on the Financial Aid Internship Program at the California State College, Fullerton," *Journal of Student Financial Aid*: Vol. 2 : Iss. 1 , Article 3.

Available at: <https://ir.library.louisville.edu/jsfa/vol2/iss1/3>

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A REPORT ON THE FINANCIAL AID INTERNSHIP PROGRAM AT THE CALIFORNIA STATE COLLEGE, FULLERTON

T. D. Morris

The recruitment of competent financial aid practitioners is a problem which has long plagued the profession. There is no academic program which routinely produces trained graduates, and there is no reservoir of skilled personnel from which to draw. Hence, most financial aid recruitment efforts are directed at persons already in the field, or, in the absence of a likely candidate, at a bright young person who can readily absorb training.

The author recently found, however, that these normal recruitment channels break down when attempting to find a promising young B. A. holder from a minority group to fill an entry position in financial aid. It was impossible to locate and hire such a person and conversations with colleagues indicated that this is the rule, rather than the exception. Faced with this frustrating fact, the author concluded that a formal internship program was perhaps the best way to provide the profession with fully trained, highly-motivated new members, and at the same time increase the number of minority group members employed in the field. Accordingly, the Financial Aid Office at California State College, Fullerton began such a program in January of 1971. This article is basically a report on how the internship program was developed, how it progressed, and an assessment of its value. It is written in the hope that the experience gained thereby will be valuable to others contemplating a similar effort.



Tom Morris has been Director of Financial Aid at the California State College at Fullerton since 1964. In addition to these duties, he has served on the California State Scholarship Commission's need analysis team for the past six years; he is the placement officer for the Western Association of Student Financial Aid Administrators, and is on both the regional and national financial aid advisory board of the American College Testing Program.

INITIAL PROBLEMS

There were several problems which had to be solved before any definite steps could be taken to establish the program. For example, there was a very real question as to whether or not the space occupied by the Financial Aid Office could accommodate any more persons. The area already was overcrowded and the desks, tables and chairs were utilized to the maximum by permanent staff and student assistants. After a thorough examination of all factors, however, it was determined that a judicious staggering of schedules would provide seating space for no more than three interns. The number of interns, therefore, was determined by the space limitations.

Salaries for the interns were the next consideration. Student assistant funds assigned to the Financial Aid Office were limited, and the institution had no other funds which could be diverted to this purpose. There was, however, an unencumbered balance remaining in the 3% administrative fund, and it was decided that intern compensation would represent an entirely legitimate expenditure from this account. The amount available dictated that each of the three interns could be paid a flat \$100 per month. It was feared that this modest amount might not attract the caliber of interns that was desired, but as it turned out, this fear was not realized. Nonetheless, to enhance the attractiveness of the intern program, and to compensate somewhat for the low salary, arrangements were made with the School of Education and the Department of Public Administration to provide academic credit for the intern experience.

The development of the intern curriculum became the next objective, and the Financial Aid staff had to ask itself, "What do financial aid professionals need to know?" After some months of discussion, it was agreed that a competent financial aid practitioner must master three basic areas of knowledge. First, he must be intimately familiar with the technical aspects of financial aid, to include need analysis and the statutes and implementing regulations of all Federal and State programs. Second, since interviewing and financial counseling is a vital part of the financial aid effort, a knowledge of interviewing techniques is essential. Third, most financial aid professionals are responsible for the management of at least one program, and this factor suggested that solving management problems should be an area of emphasis.

CURRICULUM DEVELOPMENT

Once these three general areas had been agreed upon, the next step was to develop a three-phase curriculum. The first phase, familiarization with the various state and federal programs and the two national need analysis systems, was to be presented by the lecture and demonstration system. The instructors were members of the financial aid staff, each lecturing upon his particular specialty. Federal and state manuals were to be used as texts with the students spending several days observing the actual operation of the various sections. This would give the interns a working knowledge of

the programs administered by the financial aid office, the forms used in each, the internal office procedures and, in short, a "feel" for the entire operation.

Upon successful completion of the first phase, as evidenced by verbal examinations and case-solving, the second phase of training was to begin. The interns were to sit in with experienced counselors to learn interviewing techniques and application of the knowledge they had gained. A critique was to follow each interview and, through gradual participation, the interns ultimately were to conduct their own interviews under the guidance of experienced professionals.

The third phase of instruction was to be conducted concurrently with the other two, with the professionals in the office sharing the management problems which arose during the year and guiding the interns to solutions. This gave the students an opportunity to participate in the day-to-day decisions of the office and gave them valuable experience in executive decision-making.

After all of these details had been accomplished, the next step was to present the plan to the Administration for approval. This approval was enthusiastically given.

PROGRAM EXPERIENCE

The above preparations took most of the 1970 Fall semester, and it was decided to begin the internships in late January '71, so that a full semester of experience could be obtained. The selection of the interns then became a matter of priority and, in this initial year, there was little or no formality in the procedure. The Financial Aid staff was asked to recommend minority group students whom they knew, the Director talked with each one to determine his interest and availability, and two blacks and one Chicano were selected to enter the training. The recommendation of the Financial Aid staff and the student's desire to participate were the only criteria used in the selection.

The program began on schedule, but some errors in the planning were immediately perceived. For example, it was originally expected that only seniors or graduate students would be admitted to the program because of the express purpose to prepare students for immediate employment in financial aid upon graduation. However, this point was not checked very carefully prior to selection, and it was found that one intern was a senior, while the other two were juniors. This was not a serious error, but it did have the effect of producing only one trained person ready for employment in June 1971.

It was hoped that the lecture portion of the first phase of instruction could be given to all three interns at the same time; however, since each was on a different schedule, this proved impossible to implement. As a result, each instructor had to give three separate lectures on his specialty, and this proved to be somewhat troublesome, particularly since three generous hunks of time had to be taken from busy working schedules. It also proved troublesome from another standpoint. The fragmented lectures precluded the in-

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terns from progressing at roughly the same speed, as was hoped, and this resulted in one intern, for example, knowing all about EOGs while another knew very little. Ultimately, of course, all the interns reached the same level of knowledge, but this was preceded by four or five weeks of chaos and confusion.

After observing 8-10 interviews, all three interns felt capable of conducting their own and asked to do so. There was some hesitation on the part of the staff, but, after it was pointed out that an experienced interviewer would always be present, approval was given. This proved to be a mistake. The interns were insecure and nervous in their initial interview situations, and the experienced counselors often had to intervene to salvage the contact. The interns were immediately returned to their former status and observed another 25 interviews before they were again allowed to serve as principals. This additional training proved to be most beneficial, for subsequent interviews were conducted smoothly and professionally.

PROGRAM MODIFICATIONS

The internship program will continue in the year to come, but the experience of last year dictates certain modifications of procedures. First of all, the interns' stipends must be budgeted within the 3% administrative account with each participant receiving about \$250 per month. Second, the designation procedure must become more systematized, with perhaps the Financial Aid Committee participating in intern selection. This modification should ensure that only seniors or graduate students are admitted to the program, plus providing a broader perspective. Third, evening seminars must be scheduled to present the instructional aspects of the program, for otherwise the varied schedules will cause some interns to progress faster than others. Fourth, the interview observation period should cover at least 30-35 separate interviews, for any number less than this does not adequately prepare the intern for this important function. Fifth, a semester is simply too short a time to produce fully qualified graduates; a full academic year is needed, and the Fullerton program has been altered to reflect this fact.

Next year's internship program will incorporate the above procedural changes, but the curriculum will remain basically the same. The one substantive change is a formal incorporation of management problems. (See curriculum at end of article.) Last year's approach did not provide enough experience in this area, and this addition was deemed necessary because the interns must be prepared to undertake such duties upon employment. Their assignments, therefore, will give them an opportunity to perfect their skills in the classroom, rather than on the job. It is believed that this practical experience, coupled with intensive instruction in the other areas of the curriculum, will help produce a competent and able financial aid practitioner.

An assessment of the value of the program can best be made by the participants themselves and those who will hire them upon graduation. One previous participant was anxious to continue in the program during his senior year, and he is now functioning at a professional level. One participant left school to open his own photography business, and another who graduated last June, received three offers of employment in financial aid offices. He accepted a position as Assistant Director of Financial Aid at a private university and reports indicate that he is doing a superb job. All indications, therefore, point to the conclusion that the intern program is a valuable one and, more over, that it is achieving its primary goal of preparing minority group members for entry into the financial aid profession.

FINANCIAL AID INTERN CURRICULUM
CALIFORNIA STATE COLLEGE, FULLERTON

1. The profession of financial aid, ethical considerations, confidentiality, viewpoints, relationships with students, faculty, the community and other college offices.
2. Emergency loan practices and procedures. Includes granting of loans, maintenance of records, collection procedures, reports to donors, management of funds.
3. Management of institutional funds. Includes accounting for funds, donor relationships, disbursement procedures, records and reports.
4. Athletic grant procedures. Includes authorization cycle, payments, accountability.
5. National Defense Student Loan (Read NDSL manual)
6. Work-Study program (Read work-study manual)
7. Educational Opportunity Grant program (Read EOG manual)
8. FISL program
9. Computation of Parents' Confidential Statements (PCS) and production of Financial Need Analysis Report (FNAR). (Read CSS manual for Financial Aid Officers)
10. Computation of Financial Aid Questionnaire (FAQ) and production of FNAR.
11. ACT financial need analysis system (Read ACT handbook)
12. Benefits derived from Social Security, State Rehabilitation, V.A., food stamps, railroad retirement, etc., and how they apply to financial need.
13. Law Enforcement Education Program (Read LEEP manual)
14. Computing need for independent students.
15. Practicum in PCS analysis and computing independent student's need.
16. State programs — State scholarships, fellowships: COG, SEOG, etc.
17. Observation: Work-Study Office; FISL Office; NDSL & EOG Office
18. Observation of interviews
19. Interview practicum

20. Management problem-solving:

- a. Submit paper analyzing emergency loan procedures and suggesting improvements.
- b. Prepare letter answering coach's request to cut athletic grants to players. (See NCAA manual and athletic grant procedures)
- c. Prepare position paper for Dean of Student's use in the President's Cabinet defending the off-campus work-study program and urging its continuation.
- d. Study exit interview procedures and submit paper suggesting improvements.
- e. From PCSs provided, prepare award packages.
- f. From the facts provided, prepare the Financial Aid Office's response to a charge of discrimination.
- g. Respond to the President's request for a scholarship fund-raising plan.
- h. Prepare justification for the hiring of another counselor in the Financial Aid Office.
- i. Prepare a memo to the EOP director explaining how we request federal financial aid funds.
- j. Prepare policy statement on the acceptance and administration of scholarship funds.
- k. Prepare other papers as assigned.