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A TAXONOMY OF OBJECTIVES FOR THE TRAINING OF FINANCIAL AID ADMINISTRATORS

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The training of financial aid administrators is mostly informal and is accomplished by the workshop and apprenticeship method. There are few training programs specifically for financial aid administrators and these include occasional two-week summer school institutes which have been sponsored by the U.S. Office of Education in coordination with a university or the various state financial aid associations. Occasionally, a financial aid administrator is able to "wing" a financial aid training program in a Master's or Doctoral program in the Student Personnel area; but, beyond having a few specific courses in financial aid administration, the candidate may engage in a practicum in financial aid or write a major paper on some financial aid related subject in order to complete the degree requirements. The void in formal degree or training programs for financial aid administrators (see: Schiesz, *Journal of Student Financial Aid*, March, 1974) is not surprising for a relatively new and emerging profession; but it is clearly one which must be responded to by universities, educational leadership, and professional associations at the local and the national levels with the development of formal training programs, degree programs, and ultimately a national examination for the certification of financial aid administrators.

The coauthors of this article are all doctoral candidates in the Higher Education Program at Boston College. Additionally, Francis Delaney is Director of Financial Aid at Holy Cross College in Worcester, Massachusetts; Gary Hylander is an instructor in Continuing Education at Framingham State College; Ruth Karp is Associate Dean in the College of Liberal Arts at Northeastern University; and Richard Lange is a licensed counseling psychologist and counselor at Merrimac College.

Background

After determining that there was a curriculum void in the training and the degree offerings for financial aid administrators in university schools of education, a study group, which was a segment of a Seminar in Curriculum of Higher Education at Boston College, set out to develop a curriculum model for a Master's degree in Financial Aid Administration. The study group labored under the direction of Dr. Michael Anello, Chairman of the Department of Higher Education. This taxonomy is abstracted from that larger project. The general objectives of the curriculum model are accomplished through the more specific objectives included in this taxonomy. Both cognitive and affective objectives are included, and they are stated behaviorally; since it is both attitude and action which we hope to develop. The general objectives for the training of financial aid administrators are to establish proficiency in the following skills:

1. Counsel students and their families about expenses, aid sources, financing of post-secondary education.
2. Administer the variety of aid programs Federal, State, local and institutional.
3. Seek new sources of aid for the families and institutions who use the financial aid officer's talents.
4. Understand with professional insight the economics and sociology of post-secondary educational programs.
5. Achieve the stated goals of the institution, the nation and the individuals concerned by effectively facilitating the programs of each.
6. Advise the institutional leaders, government and families of new needs and directions for enhancement of human development through financial support of educational programs and individuals.
7. Research new and more effective models for student aid administration.

In attempting to define the areas of inquiry and training for the financial aid administrator, difficulty was encountered in limiting the range of topics and possible courses to those which could be universally applied to all financial aid programs. The goal then was both universality in the application to the professional over wide range of personal or institutional program needs and manageability within an educational or training program. There was no attempt to overlap with the specific computational goals defined in the workshops which are conducted by the various needs analysis systems, but competence in computation techniques was assumed while objectives for the broader attitudinal areas were developed. Three major classifications of areas of study were identified: Social Sciences, Administrative and Organizational Studies, and Behavioral Sciences. Listed within each major area of study are a number of suggested courses or topical areas of concern which should be treated either as individual courses or as sections of courses in the degree or training programs.

Taxonomy of Objectives

I. SOCIAL SCIENCES

A. Sociology of Education/History and Philosophy of American Education.

1. Trace the historical and societal evolution of public and private education.
2. Understand the need for an individual to be exposed to the opportunity of some form of post-secondary education in order to better understand and contribute to society.
3. Outline the various post-secondary educational alternatives presently available.
4. Evaluate education as it presently meets the demands of a nuclear society.
5. Identify individual educational needs and the programs and experiences best designed to fulfill them.
6. Evaluate the benefits of life experiences and the integrity of mid-life career changes.
7. Explain the role of the family as the primary source of informal schooling and attitudinal transmission.
8. Identify the attitudes of minority groups and social classes toward education.
9. Identify the factors that facilitate accessibility to education among social groups.
10. Identify the significant educational reformers and their ideas and compare their impact upon society.
11. Compare and contrast state and federal statutes as they apply to educational policy.
12. Catalog the factors that allow education to function as an agent of social mobility.
13. Determine if the role of educational institutions is to mirror public opinion or rather to shape and direct it.
14. Identify the influences that a community may exert upon educational philosophy and programs.
15. Describe the social, cultural and intellectual impact of organized education as a change-agent upon the community.

B. Social Inequity/Minority Group Sociology/Discrimination.

1. Learn origins and historical development of philosophical concepts of equality.
2. Critically examine major theories of the origins, causes and functions of social inequality.
3. Examine and relate historical trends in distribution of income, wealth and power to concepts of equality and social inequality.
4. Understand varying roles and positions in American society of minority groups and explain why they are at times subject to discriminatory treatment.

5. Specify psychological effects of poverty and discrimination as experienced by different minorities studied.
6. Evaluate the effect on society as a whole of discrimination against any group.
7. Examine court decisions relative to discrimination; describe how they have been implemented; evaluate their effects.
8. Critically examine the theoretical reasons given for discrimination; list and explain the effects of discrimination on individuals and groups.
9. Identify personal and societal problems caused by poverty.
10. Identify personal and societal problems caused by discrimination.
11. Critically review scholarly literature on social stratification and inequality.
12. Compare and evaluate suggested means for dealing with social inequality from different political and ideological perspectives.
13. Examine ways in which race and poverty lead to discrimination in the access to post-secondary education.
14. Examine ways in which discrimination in the access to post-secondary education affects the performance of those subject to discrimination.
15. Identify areas where change of a remedial nature could and should be made to insure equality of access to post-secondary education; evaluate the feasibility of making such changes.
16. Support recommendations for change by documentary (theoretical) and actual evidence of the effectiveness of recommended changes.
17. Establish an order of priority for recommended changes and actions, taking into account their feasibility.

C. Education and Political Process/The Law and Post-Secondary Education/Current Problems in Education.

1. Explain the dynamic and structural aspects of national government as it relates to governmental involvement with education in general and the support of post-secondary education in particular.
2. Describe the influence of the President, Congress, political parties, interest groups (lobbies), the administrative bureaucracy and public opinion on the development of legislative programs and public support of post-secondary education.
3. Critically examine the general structure of education in the United States at the national, state and municipal levels, and private and public levels.
4. Evaluate ways in which the variety of influences mentioned above affect the allocation of resources for education at various levels.
5. Relate basic laws affecting the structure of and allocation of educational resources to educational institutions and students.
6. Examine the effects of landmark court decisions on American post-secondary education.

7. Identify the critical issues of post-secondary education in the early 1970's.
 8. Project and predict critical issues of post-secondary education from 1975 on.
 9. Identify areas where change in the systems of post-secondary education should be made. Suggest ways in which to make these changes, and evaluate their feasibility.
 10. Suggest ways of meeting the critical issues of post-secondary education and evaluate the feasibility and effects of the suggestions.
- D. The Family/Economics of the Family/Counseling the Family for Education.
1. Appreciate the role of the family as the first level of informal schooling and transmitter of values and cultural heritage.
 2. Gain an awareness of the impact of societal mores and rapidity of change upon the family unit.
 3. Develop an understanding of the family's role and position as an integral institution within the general context of contemporary society.
 4. Isolate and identify those factors which both contribute to and detract from a healthy family environment.
 5. Appreciate the personal, emotional and physiological needs that must be provided for within the family unit.
 6. Detail and determine economic requirements and fiscal priorities of families from various social stratas.
 7. List the factors that differentiate the social composition and needs of families from rural, urban and suburban environments.
 8. Compare the structure of minority group families and examine ethnic attitudes towards success, education, society and class values.
 9. Apply the skills of counseling techniques in resolving family conflict, social adjustment and periods of stress.
 10. Discuss the advantages of the variety of sources listing the options and alternatives of the programs and the value to families which might use these different programs.
 11. Discuss the impact of family goals, Federal goals and funding levels and family income on students' aspirations to the variety of post-secondary educational programs.
 12. Write financing plans for a low, a middle and a higher income family where a student of that family is attending a 2-year, a 4-year or a vocational post-secondary school. Utilize all of the possible sources open to the model family in each category.

II. ADMINISTRATIVE AND ORGANIZATIONAL STUDIES

- A. Organization of the University/Administration of Post-Secondary Aid Programs/Financial Aid Administration Management and Methods/Financing of Education.

1. Illustrate the structure of a college showing the main divisions, departments and offices and their relationship to each other department in the structure.
2. Write a brief description for each administrative department demonstrating its functional relationship with the student aid office.
3. Develop, after visiting several functioning aid offices, a model for a management information system for a financial aid office.
4. Write manuals for each phase of operations in the financial aid office.
5. Write job descriptions for each assistant or clerk who has an assignment to a particular operation in the office.
6. Organize in-service training for all those in the institution who participate in the administration of the financial aid programs.
7. Supervise the office functions, staff and auxiliary support programs.
8. Construct expense budgets for attendance at an institution for the variety of programs and students including the single dependent student, the married student, the non-traditional students.
9. Design the institutional financial aid application and other internal forms.
10. Evaluate the variety of credentials of aid applicants.
11. Determine institutional priorities for the allocation of financial aid funds.
12. Coordinate the distribution of funds by priority.
13. Utilize the management information system for projections and evaluations of the program.
14. Assess needs for funds for the purpose of future budgeting requests from the institution, Federal and State governments.
15. Prepare recommendations for improvement of the program and operations from time to time as circumstances change or need update.
16. Prepare an annual report summarizing the activities of the student aid program.
17. Prepare reports utilizing information from the management information system which describes the participants in the financial aid program.
18. Demonstrate ability to maintain cumulative and comprehensive financial records.
19. Recognize the importance of developing the student personnel aspect of student aid.
20. Develop an awareness of the importance of interpersonal relationships in a financial aid office.
21. Demonstrate ability to implement policy on financial aid.
22. Adequately package aid, relating form and amount of aid to the individual's need.
23. Recognize the need for securing informational research on the conduct and effect of student aid.

24. Screen all applicants; categorize aid packages; allocate funds to specific programs; award aid to needy students.
25. Realize the importance of confidentiality in the financial aid process.
26. Make appropriate referrals when necessary.
27. Consider financial aid granting as an educational experience including counseling, information giving, follow-up, research and evaluation.
28. Discuss and detail with historical accuracy the various landmark Federal assistance programs to post-secondary education.
29. Identify the bases of the goals which influence legislation and appropriations proposals.
30. Evaluate the above goals and their impact on institutions of all types as well as families at the low and middle income levels.
31. Illustrate graphically the process of Federal aid to higher education from the idea to the actual tender of money to the institution and the individual.
32. Evaluate the problems of fluctuation in Federal aid levels to educations citing specific impacts to individuals and institutions.
33. Propose alternatives for stabilizing funds for education: Corporate (private) and personal (family level) as well as State or Federal.
34. List examples of the variety of corporate and foundation sources of assistance to institutions and individuals.
35. Propose an ideal form of private corporate aid to education being certain to take into account all variables.
36. Cite the historical trends and levels of corporate commitment of aid to education.
37. Defend the role of corporate responsibility to higher education.
38. Outline the impact of the economic cycle on families and their attendance in post-secondary education showing the relationship between enrollments and economic conditions.
39. List the variety of sources of funds which are available to individuals for use in post-secondary education.

III. BEHAVIORAL SCIENCES

- A. Counseling Technique and Methods/Psychology of Education/Psychological Tests and Measurement.
 1. Demonstrate a professional attitude towards counseling and evidence ethical behavior.
 2. Convey acceptance of the person being counseled and accept the right of the individual to make decisions and assume responsibility for his behavior.
 3. Demonstrate flexibility in various counseling relationships.
 4. Develop communication skills of understanding to assist the counselee in formulating alternatives and assessing possible consequences.

5. Project honesty and sincerity in attitudes by expressing "appropriate openness."
 6. Demonstrate knowledge of the basics of psychological testing.
 7. Develop ability to form a counseling relationship and handle an interview.
 8. Utilize background information and case records in counseling.
 9. Internally accept the need for confidentiality in all helping relationships.
 10. Demonstrate counseling competence by effectively interviewing a person regarding a financial aid matter.
 11. Make appropriate referrals when necessary.
 12. Develop a personal synthesis and a philosophical framework to counseling.
- B. Research in Financial Aid Problems/Statistics.
1. Identify significant problems relevant to financial aid situations and collect pertinent data to resolve these issues.
 2. Select alternative solutions and weigh their consequences in terms of probability of effectiveness.
 3. Develop a problem-solving and research oriented approach to financial aid program needs.
 4. Synthesize concepts and theories and apply them to concrete financial aid situations.
 5. Utilize imaginative approaches to situations and show a willingness to use new and different methods.
 6. Demonstrate knowledge of basic statistical methods and how to apply them for purposes of research and professional growth.

Conclusion

The above objectives represent a basic nucleus of learning outcomes for the training of professional financial aid administrators. With no apology intended, it is recognized that additions and deletions of many of these objectives will be consistent with individual or program needs of those who might follow these suggestions for training. This taxonomy, then, is not the last word but is a beginning point in an area which needs a great deal of additional development.