

Doing More or Less with Less

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**Michael Reynolds:
The Auburn Story**

The Auburn Story: How it all Started

- Admission Office's need for a better location to upgrade their image
- Bursar Office no longer needed space for long lines
- Bursar became Banner Project Manager
- Bursar job becomes vacant
- Financial Aid Director applies
 - Financial Aid Director chosen to head both functions

The Auburn Story: New Name

- The Offices of Bursar and Student Financial Aid become:
Student Financial Services
 - Identified areas by function
 - * Billing and Payments * Collections
 - Student Loans * Financial Aid
- Continued separation of duties to assure compliance with Title IV Regulations
 - Financial Aid employees have no access to change bills or collections, and Billing & Collections can not change or delete Financial Aid awards.

The Auburn Story: New Location

- The Offices of Financial Aid and Admissions occupied space in Mary Martin Hall
 - First Library Building on campus
 - In desperate need of renovation
- Bursar office in the Quad Center
 - One of the largest and nicest buildings on campus
 - Needed during the "paper check days" of the Bursar
 - Campus cafeteria prior to becoming Bursar Office

The Auburn Story: Challenges

- Employees' resistance to change
- Bursar employees' perception of losing their identity
- Analyzing and deciding what if any changes should be made to best serve the entire office
- Implementing efficient, effective phone coverage
- Combining leadership philosophies and styles

**The Auburn Story:
Reorganization**


- Student loan expert in Financial Aid joins Student Loan Department from Bursar area
- Staff member responsible for Budget in Financial Aid takes on budget of both areas
- Staff member in Bursar area responsible for personnel issues takes on responsibilities of both areas
- Separating entire office into three different functions
 - Technical
 - Customer Service
 - Administrative

The Auburn Story: Benefits


- More convenient and time efficient service for students and parents
- Easier access for students and parents
- One stop shop regarding student's finances
- More unified training for employees results in better communication with students and parents
- Pleasant, professional environment for employees, students, parents, and other visitors

The Auburn Story: Takeaways

- 1.
- 2.
- 3.




**Brent Tener:
HEOA Tools**



HEOA Tools: It's Not All About You!

- Unlike other Reauthorizations, there is literally something in this for everyone
 - The textbook story
- Communicate quickly and effectively with your upper administration
- Should be a point person on campus and not necessarily you in the financial aid office!
- Some aspects of the law are in effect now!



HEOA Tools: It's Not All About You!

- Resources available to you:
 - www.ifap.ed.gov
 - Dear Colleague Letter
 - Information on Negotiated Rulemaking
 - Original copy of the Higher Education Opportunity Act
 - NASFAA – www.nasfaa.org
 - Most items for members only
 - NASFAA's summary of the Act
 - Training webinars
 - The Spreadsheet

Communicating with Upper Management

- Communication is a contact sport
- No one knows your business like you do
- Quantify, quantify, quantify
- Tell your story with words and pictures
- Use the same words and phrases over and over again
- You are valuable because of your knowledge!

Communicating with Upper Management: Dr. Phil Day

- Current NASFAA President and CEO, former College President
- Be healthy mentally and physically
- Take leadership role in campus committees
- Bosses love to see data!
 - How many applications, this year compared to last year
 - Loan volume
 - Head count
 - Diversity

Communicating with Upper Management: Dr. Phil Day

- Provide information on a frequent basis
 - It is as much about the data as it is your boss knows you are looking at the data on a frequent basis
- Get on the agenda of a senior staff meeting at least once a year
- Have an open house
- Have a United Way type thermometer outside your office
- People love to know what you know

Communicating With Upper Management: Takeaways

- 1.
- 2.
- 3

**Runan Pendergrast:
NASFAA Office Staffing Model**

NASFAA Staffing Tool

- Key Factors in Financial Aid Office Staff Size: Results of the 2006 NASFAA Staffing Survey and Developing of the Staffing Model
- Report summarizes the results of the 2006 NASFAA Staffing Survey.
- Survey contained 32 question with sub parts to the questions.
- 647 out of 2582 responded to the survey.
- Survey results were used to develop a new self-assessment model.
- Report available online at <http://www.nasfaa.org/PDFs/2006/2006staffingmodelsurvey.pdf>

NASFAA Salary Tool


- A separate publication, *Key Factors in Compensation of Financial Aid Administrators and Staff*, was published in 2003
- Provides a self-assessment model for determining average salaries based on key compensation factors.
- report are available for no charge to NASFAA members at <http://www.nasfaa.org/AnnualPubs/SalarySurvey4.PDF>
- Non-members pay purchase a copy at pubs@nasfaa.org

The NASFAA 2006 Staffing Self-Assessment Tool


- It is a tool to assist aid administrators to estimate the average number of employees needed to staff the financial aid office.
- Four major factors to influence the staff size:
 - > workload
 - > staff size of other student services offices
 - > volume of aid administered
 - > participation in specific programs.
- <http://www.nasfaa.org/redesign/staffingmodelmenu.asp>
- Download EXCEL file

NASFAA Staffing Model: Takeaways

- 1.
- 2.
- 3.




**Runan Pendergrast:
Office Morale**



Office Morale

- A majority of the issues related to worker productivity stem from enthusiasm.
- Causes of morale correlate back to the organization, its culture, and management.
- Organizational Issues affecting morale and productivity include:
 - Leadership not serving as an exemplars
 - Little or no accountability
 - there is no succession planning
 - Infighting amongst departments
 - Too many silos
- Leaders need to harmonize with employees and treat all equally.

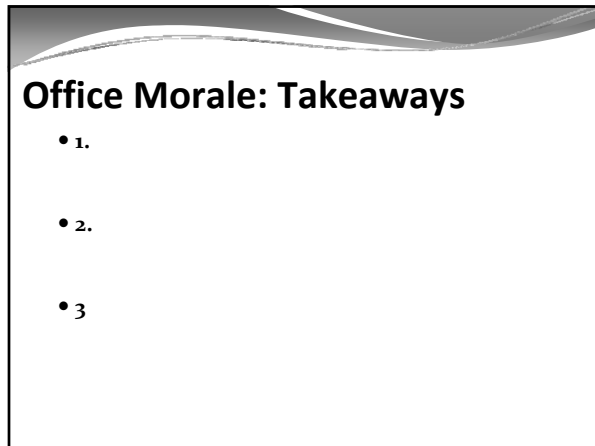
Source: How to Increase Morale at Work
By Drew Stevens



4 Cues for Office Morale

- 1. Start with the right people
- 2. Hire for skill
- 3. Look at best practices from best people
- 4. Passion

Source: How to Increase Morale at Work
By Drew Stevens



Office Morale: Takeaways

- 1.
- 2.
- 3

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