



Bridging the Gap Between the Financial Aid Office and the University

P&N Postlethwaite & Netterville



Objective

This discussion will attempt to shed light on the gap between the FAD and the other offices of the Institution, providing thoughtful discussion topics and action items for increased efficiency, visibility for the FA Office, and tools for navigating competing missions, goals and measurements of success.

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Financial Aid Office

- Service-oriented
- Compliance-Driven
- Governed in multiple layers
- Interaction with most all divisions
- Responsible for Federal Aid, including processes outside span of control
- Program Participation Agreements: Not just a Financial Aid responsibility

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Starting the Conversation

- Do you have a copy of your institution's PPA?
- Before you can be understood, you must seek to understand (S. Covey)
- Relationships start with one person reaching to the other- not always about work
- Education doesn't have to be about regulations; can be about areas of commonality



Finding the Common Ground

Common missions:

- Student services
- Improved communication to students and parents
- Improved service from the institution,
- Proactive responses
- Increased enrollment, higher rate of retention
- Positive publicity for the institution



Navigating Diverging Goals

- Seek to understand where your colleagues' goals differ from yours
- Understand processes and risks; seek to involve you or your leadership for a shared service mentality
- Be an entrepreneur! No one is better at figuring out how to make it happen than FA Professionals.
- Seek help from colleagues' – ask opinions and get perspective



Action Items

- Carry your PPA or a blank copy for reference when you meet with executive leadership
- When you have training opportunities in the office, invite others from Bursar, Registrar, Admissions, Athletics, etc. Reach out!
- Don't stop extending invitations
- Offer your help in exchange (peak seasons are not the same for all offices)



Ideas, Suggestions, Best Practices

- No office is more enterprising than the FA Office
- What can you all offer to all of us?
- Networking is key- not only within the FA office but within the scope of Higher Education
- Use students and former colleagues as resources
- What other ideas?



Questions

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