



Business Office and Financial Aid – Partnering For Success Think About Tomorrow®

Martie Adler, Professional Services Consultant
American Student Assistance



Objectives For Today


- o Dialog and Discussion
 - o What Is the Current State of the Relationship
 - o National Data
 - o Issues and Concerns
 - o Resolution and Partnership
- o Models for Success



What Is the Current State of the Relationship?

The answer to this question is as unique and individual as each of you are.....

Let's find out



Stats

1. For those of you that DO have a good working relationship, why ?
2. For those who do NOT, why?



National Stats

Since 1997 I have been surveying both business office and financial aid professionals to find the answer to the questions I just asked you.

Do you think the answers varied by profession?

What percentage of professionals felt that they had a good partnership between financial aid and business office?



Issues and Concerns

Based upon the results we find in this room, and the national sampling, do we have some work to do??

What are the issues



Resolution

1. What are the main issues we have identified that are preventing a good working relationship?
2. What will need to change for that to happen?



Organizational Change

Steps that can be taken to optimize relationships between departments:

- Get decision makers and leaders within your office together for a truthful discussion.
- Identify the critical factors that are preventing you from providing excellent customer service to your students and to each other.
- Identify which factors are within the control of your office, and which factors are not.



Organizational Change Con't

- Define what can be changed within your office in terms of processes, resources, policy, etc.
- Make the changes that you control, monitor the results. Understand that this is an on-going process that may need to be changed as factors change.
- Now it's time to set meetings with the Business Office (or any other office that you want to partner with).



Meetings With Your Potential Partners

- Get decision makers and leaders within the two offices together for a truthful discussion.
- Identify the critical factors that are preventing excellent customer service to your students and to each other.
- Clearly define the real issues that must be addressed to have a true partnership.
- Identify which office holds the scope of control for each factor. (Note that some may overlap).



Meetings With Potential Partners con't

Develop a plan to work towards partnership.

- Identify all issues that will need to be resolved.
- Prioritize them by order of importance in terms of customer focus.
- Define how the issues will be addressed: work teams, champion, by directive, etc.
- Set meetings with all stakeholders to discuss the plan and offer opportunity for volunteers.
- Determine a re-occurring meeting schedule for follow-up.



Nothing Is Set In Stone

Remember that once you begin the process of continued dialog, you will uncover more information.

With on-going meetings, your plan can easily be adjusted to address the changes and new information.

This is not unlike any relationship – it will grow and develop!



Can You Make It Happen?



Models for Success



One Stop Shopping For Students

- ✓ Moved toward “one stop shopping” for students
- ✓ Some combined all “student service” related departments under one umbrella
- ✓ Some operate autonomously, but are now housed together to make it simpler for the student
- ✓ Often share staff
- ✓ Have a front desk receiving area staffed by employees from numerous departments



Same Umbrella

Some schools have both the Business Office and Financial Aid Office under one reporting structure.

- Separate Directors
- Separate functions due to regulations
- Staffing may or may not flow between the departments
- Common space
- Meetings and planning involve both offices



Shared Function

Some schools have gone through real organizational change and have created a work plan that moves functions to the office best suited to handle the work.

- Regulatory compliance directs movement.
- Jobs are filled with people who indicate both interest and ability to do the work.
- Some job functions are a shared responsibility.
- Meetings occur on a regular basis to adjust and plan.



Two Departments—One Plan

Some schools have chosen to go through the steps we've discussed today. Either by themselves, or with the assistance of a consultant.

The results are:

- A valued working partnership.
- Extreme customer service to the students and to each other.
- A series of departmental meetings involving all employees from both departments.
- Work teams created to direct change and function.



