

**CAN FINANCIAL AID &
BURSARS OFFICES PLAY
WELL IN THE SAME
SANDBOX?**

DISCLAIMERS

- We did not stay in a Holiday Inn last night
- This is not marriage/relationship counseling
- One size does not fit all
- Own your path to better relationships, make it fun however that looks for you.

WE ARE ... PENN STATE!



- Pennsylvania's only Land Grant Institution, founded in 1855
- Approximately 97,494 total students across all 26 locations and all levels.
- World Campus had 12,242 students in 2016
- Approximately 85% of the World Campus students identify as adult learners by age, military affiliation, or dependents.
- WC Financial Aid Office = 8 staff
- WC Bursar Office = 9 staff

HISTORY OF FINANCIAL AID

- Started out as 1 person, who split her time between World Campus and the Main Office of Student Aid.
- 2010 a person was hired who split their time 50/50 between the main Office of Student Aid and World Campus. Previously it was more of a 20 WC/80 OSA split.
- Eventually it was decided that a full-time WC position was needed.
- 2011 a graduate assistant was hired and the first WC Financial Aid Office manager was hired. Six weeks later a new manager was hired.
- 2012 the first aid coordinators were hired, we were up to 5 staff!
- 2017 we have a staff of 8.
- Handle a large variety of questions, professional judgements, scholarships, aid related marking and social media, figure out solutions to problems 😊

HISTORY OF BURSARS OFFICE

- November 2005 the World Campus Bursar office staff consisted of 6 people, currently a staff of 9.
- Registrations were all in the form of paper registrations. No online registration.
- Payment for classes was required at the time of registration, Bursar office processed all credit card and check payments manually at that time.
- World Campus Bursar office processes billing for third party payers like companies and military tuition assistance and employer deferment.
- World Campus processes third party payments via credit card and checks.

WHY IS THIS EVEN IMPORTANT? BESIDES THAT YOUR MOTHER SAID TO PLAY WELL WITH OTHERS.

- Help provide the high quality customer service to current and prospective students and their families as well as other Penn State employees
- Good working relationships help create better work environments.
- If both are small offices, like at World Campus, you may have limited ability within the systems. Your roles can work TOGETHER to expand what you can do!
- Understanding that both offices work differently can help find bridging areas.
- The science of the Bursar can work with the art of Financial Aid if we try.

RESEARCHY STUFF



- Positive workplace cultures have a direct impact on engagement.
- Disengagement is costly.
- Developing working relationships based on trust and mutual respect can create an atmosphere conducive to teamwork.
- Having personal connections increases team productivity.
- Trickle down effect:
 - Improving relationships among coworkers helps improve morale for a staff as a whole. Increased morale leads to a more positive working environment. When employees are happy at work, they actively engage in assignments and focus less on escapist behaviors

HOW LEADERSHIP CAN PLAY A ROLE?

Attitude reflects leadership, Captain.



Leaders become great, not because of their power, but because of their ability to empower others.

~John Maxwell

www.gauraw.com

~ Remember the Titans



- When in a position of authority, your attitude greatly affects those around you.

COMMON GROUND

- Snoop Dog & Martha Stewart had brownies and mashed potatoes, World Campus had LionPATH.
- LionPATH was definitely the bonding agent for Bursar and Financial Aid.



Sometimes something happens that bonds different groups together and sometimes you just have to find what you have in common.

SIMILAR BARRIERS AND CHALLENGES



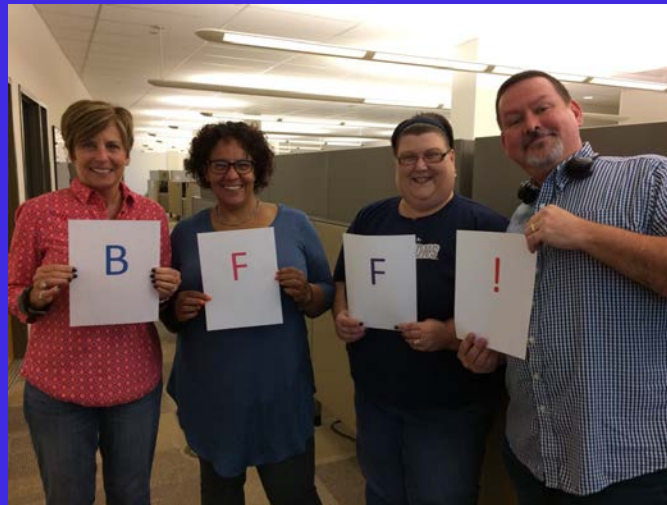
- Some issues that can arise require the help of other areas, no unit is an island
- Some times the logistics need cooperation to be able to work
- Students and parents seem to tend to wait until there is an issue before calling.
- LionPATH is not a completely friendly program in terms of financial aid or bursar needs.
- Not knowing what other units do can impact what your unit does. It can create unforeseen issues or prevent quality service.

WHAT WE DID

- Come to the dark side we have Food and Fun! (really we do)
 - Cookie exchange for the holidays
 - Breakfast potlucks with homemade bread French Toast
 - Ice Cream!!
 - Job shadowing opportunities
 - Sadly building policies did not allow for kittens
 - Holiday crafts!



WHAT WE DID



HOW ARE WE DOING IN THE SANDBOX NOW?



JUST KIDDING!

