NASFAA has heard from several members about financial aid offices facing turnover and staffing shortages deemed as the “Great Resignation.” As discussed earlier this year in NASFAA’s Today’s News, for the last several years, one of the items at the top of the Board of Directors’ agenda has been succession planning and retaining staff, as reflected in our training, conference tracks, and online forums.

To learn more about the staffing shortages our members are facing, NASFAA is conducting a brief staffing survey to gauge staffing levels, outsourcing, and the ability to fill vacant positions since the onset of COVID-19. Instructions for the survey are below, and a PDF of the survey instrument may be viewed online.

This survey is not meant to replace NASFAA’s ongoing staffing benchmarking surveys. Rather, this survey is meant to help us better understand the acute staffing challenges aid offices may or may not be facing now.

Survey Notes:
- Due to skip logic embedded in this survey we cannot offer a “back” button. Once you advance past a page, you will not be able to return to the previous page. If you wish to view all the questions prior to completing the online instrument, we encourage you to access our PDF version of the survey.

Survey Instructions:
- Some questions the survey will ask you to specify positions and in some full-time equivalent.
  - Permanent Full-time equivalent (FTE) is defined as an employee working 35 hours per week or more who was not a temporary employee.
  - In all questions, part-time employees should be included and counted based on their hours worked, or their FTE. For example: A part-time employee who worked 17.5 hours per week in a 35 hour per week full-time position would be entered as .5.
- Please enter only numbers or decimals into the text boxes provided. Do not use commas (,) or text.

Thank you for taking the time to complete this survey. The results will be shared with members via Today’s News at a later date and used in our ongoing work to communicate with campus leaders on the vital importance of adequately funding and staffing aid offices.
Section: Staffing

**Question:** How many permanent positions were there in your office during the following aid years?

**Note:**
- Do not include student interns, work-study employees, or unpaid volunteers.
- If this number fluctuated over the year, please use the average.

<table>
<thead>
<tr>
<th></th>
<th>Total Positions</th>
<th>Of this total, how many were vacant?</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019-20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2020-21</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Question:** How many temporary positions worked in your office during the following aid years?

**Note:**
- Do not include student interns, work-study employees, or unpaid volunteers.
- If this number fluctuated over the year, please use the average.

<table>
<thead>
<tr>
<th></th>
<th>Number of temporary positions</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019-20</td>
<td></td>
</tr>
<tr>
<td>2020-21</td>
<td></td>
</tr>
</tbody>
</table>

**Question:** What role does temporary staffing have in your financial aid office? (Check all that apply.)

- We use it during high processing times
- We began using it during COVID-19
- We only use temporary staffing for leadership positions
- We only use temporary staffing for support staff
- My institution does not allow the use of temporary staffing
- Temporary staffing at my institution does not fulfill my office needs
- My office chooses not to use temporary staffing
**Question:** During the following aid years, how many **permanent full-time equivalent (FTE) employees** left your institution’s financial aid office for any of the following reasons?

<table>
<thead>
<tr>
<th>Reason</th>
<th>2019-20</th>
<th>2020-21</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resigned</td>
<td>Drop Down w/Numbers 0 - 11+</td>
<td>Drop Down w/Numbers 0 - 11+</td>
</tr>
<tr>
<td>Transferred (Took a different position at the same institution)</td>
<td>Drop Down w/Numbers 0 - 11+</td>
<td>Drop Down w/Numbers 0 - 11+</td>
</tr>
<tr>
<td>Retired</td>
<td>Drop Down w/Numbers 0 - 11+</td>
<td>Drop Down w/Numbers 0 - 11+</td>
</tr>
<tr>
<td>Terminated (Could include budget cuts or layoffs.)</td>
<td>Drop Down w/Numbers 0 - 11+</td>
<td>Drop Down w/Numbers 0 - 11+</td>
</tr>
<tr>
<td>Promoted</td>
<td>Drop Down w/Numbers 0 - 11+</td>
<td>Drop Down w/Numbers 0 - 11+</td>
</tr>
<tr>
<td>Deceased</td>
<td>Drop Down w/Numbers 0 - 11+</td>
<td>Drop Down w/Numbers 0 - 11+</td>
</tr>
</tbody>
</table>

Display if "During the following aid years, how many permanent full-time equivalent (FTE) employees left your institution’s financial aid office for any of the following reasons?" = Any number above one selected:

**Question:** Approximately how many of those departures were COVID-19-related (e.g. an employee was terminated because their position was eliminated due to COVID-19, an employee decided to retire early due to COVID-19, or an employee left the workforce to stay at home with their family during COVID-19)?

- Please enter the number of **positions**, not a percentage.

Display if "During the following aid years, how many permanent full-time equivalent (FTE) employees left your institution’s financial aid office for any of the following reasons?" = Any number above one selected in Resigned or Transferred:

**Question:** What were some reasons **permanent full-time equivalent (FTE) employees** cited for transferring or resigning? (Check all that apply.)

- Higher salary or better benefits in new/different position
- Dislike of current workplace policies
- Desire for permanent remote workplace
- Family obligations
- No longer desire to work in financial aid
- No longer desire to work in higher education
- Relocation
- Furthering their education
- Moved to a different office at the same institution
- Left the workforce
- Other (Please specify below.)
Display if “During the following aid years, how many permanent full-time equivalent (FTE) employees left your institution’s financial aid office for any of the following reasons?” = Any Number selected:

**Question:** How many **positions**, did you fill during the 2019-20 and 2020-21 award years?

Note: For this question, please provide a combined number for both award years

<table>
<thead>
<tr>
<th></th>
<th>Drop Down w/Numbers 0 - 11+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newly hired staff</td>
<td></td>
</tr>
<tr>
<td>Rehired staff (Does not include internal promotions)</td>
<td>Drop Down w/Numbers 0 - 11+</td>
</tr>
<tr>
<td>Temporary staff</td>
<td>Drop Down w/Numbers 0 - 11+</td>
</tr>
</tbody>
</table>

Display if “During the following aid years, how many permanent full-time equivalent (FTE) employees left your institution’s financial aid office for any of the following reasons?” = Any Number selected:

**Question:** How many **positions**, did you have difficulty filling during the 2019-20 and 2020-21 award years due to COVID-19?

Note:
- For this question, please provide a combined number for both award years.
- COVID-19 reasons could include budget cuts, hiring freezes, inability to find qualified staff, etc.
- Examples of difficult include: Reposting a position, having a failed search, rewriting a job description

Drop Down w/Numbers 0 - 11+

Display if “During the following aid years, how many permanent full-time equivalent (FTE) employees left your institution’s financial aid office for any of the following reasons?” = Any Number selected:

**Question:** How difficult was it to fill your vacant positions with qualified staff?

- Very Difficult
- Difficult
- Easy
- Very Easy
Display if “How difficult was it to fill your vacant positions with qualified staff?” = Very Difficult or Difficult selected:

Question: Why was it difficult to fill your vacant positions with qualified staff? (Check all that apply.)
- We did not receive enough qualified applications
- The pool of applicants we received were overqualified
- The salary we offered was not competitive
- Applicants cited a desire for permanent remote workplace
- Due to remote work and COVID-19, our student worker pipeline was reduced
- Our institution experienced a hiring freeze
- Our institution experienced budget cuts that made filling positions difficult
- Hiring process was delayed and we lost candidates
- Hiring process was too time-intensive and we were unable to conduct searches for some/all vacant positions
- Other (Please specify below.)

Question: At the time you are completing this survey, how many vacant positions are there in your financial aid office? (Please include permanent and temporary positions.) <Open-ended box.>

Display if “At the time you are completing this survey, how many vacant positions are there in your financial aid office?” = Any Number entered:

Question: On average, how long have your currently vacant positions been unfilled?
- 30 days
- 3 months
- 6 months
- 1 year
- Longer than one year
**Section: Administrative Capability & Student Services**

**Question:** Do you feel you have the staff and resources necessary to administer the financial aid programs in compliance with the administrative capability requirements outlined in section 668.16(b) of the Standards for Participation in Title IV, HEA Programs?

- Yes
- No

Display if “Do you feel you have the staff and resources necessary to administer the financial aid programs in compliance with the administrative capability requirements outlined in section 668.16(b) of the Standards for Participation in Title IV, HEA Programs?” = No selected:

**Question:** What is your level of concern about your school’s ability to be administratively capable?

- Very unconcerned
- Slightly unconcerned
- Neither unconcerned or concerned
- Slightly concerned
- Very concerned

Display if “Do you feel you have the staff and resources necessary to administer the financial aid programs in compliance with the administrative capability requirements outlined in section 668.16(b) of the Standards for Participation in Title IV, HEA Programs?” = No Selected:

**Question:** How many additional positions do you feel your office needs to be adequately staffed?  <Open-Ended>

**Question:** What is your level of concern about your school’s ability to adequately serve your students?

- Very unconcerned
- Slightly unconcerned
- Neither unconcerned or concerned
- Slightly concerned
- Very concerned
### Section: Outsourcing

**Question:** Please answer the following questions related to outsourcing (contracting out to a third party to complete a service):

<table>
<thead>
<tr>
<th></th>
<th>My office outsourced this prior to March 2020</th>
<th>My office began outsourcing this after March 2020</th>
<th>My office does not outsource this area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial aid packaging</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial aid offers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Call centers (Incoming/Returning Calls)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Verification</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Debt management</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial literacy</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delinquency/default management</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collections or Institutional Loans</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grace/repayment loan counseling</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Loan reconciliation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Policies and procedures</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Temporary staffing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Record keeping/document storage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (Please specify below.)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Display if “My office outsourced this prior to January 2020” OR “My office began outsourcing this after January 2020” = YES for any category:

**Question:** What was the reason that your office began outsourcing this during the pandemic? <Open-Ended>
Display if "My office does not outsource this area" = YES for EVERY category:

Question: Why does your office not outsource any services? (Check all that apply.) <Open-Ended>

- Funding
- Institution’s contracting / procurement policies
- Lack of confidence in the quality of an outside contractor’s work
- Lack of time to coordinate or onboard services
- Overwhelmed by vendor choices
- Privacy concerns
- Don’t know vendors
- Other (please specify below.)