

NASFAA's Off the Cuff Podcast - Episode 211 Transcript

OTC From the Field: Financial Aid Administrators' Post-Pandemic Office Plans

Justin Draeger:

Hey everyone. Welcome to another edition of Off The Cuff. I'm Justin Draeger.

Melissa Kunes:

Hi, I'm Melissa Kunes. I'm the Assistant Vice President for Undergraduate Education and Executive Director for Financial Aid at Penn State University.

Tyler Pruett:

And I'm Tyler Pruett, the Director of Financial Aid and Scholarships at Samuel Merritt University in Oakland, California.

Justin Draeger:

Thanks, Melissa and Tyler very much for joining us today. This is one of our episodes where we're doing something from the field. We want to hear from folks who are out there actually operationalizing financial aid. And this week is a topic Hugh is producing for us this week that we've heard a lot about from our members, which is if you look at all the things that happened during the pandemic, we had to make a lot of changes, a lot of changes to how we operate. And one of the big questions was coming out of the pandemic, as schools start doing back in person learning, what changes in the financial aid office that happened because of the pandemic are going to hang around after the pandemic, and more specifically around hybrid work environments, working from home productivity, communication, forging relationships? And to help us sort all that out is going to be Melissa and Tyler today. So thanks again for joining us.

Justin Draeger:

Let me just jump right in. I'm curious, Melissa, if you can tell us, how was your office working before the pandemic and then right after the national emergency was declared, what changes did you have to make, specifically around whether everybody was working in the office or some sort of hybrid?

Melissa Kunes:

Okay, well thanks Justin. Well, pre-pandemic at Penn State, we had about 75 staff who worked at our University Park financial aid location, and they came into the building every day for in-person interactions, in-person meetings with students and families, large group staff meetings, office gatherings. We also have 23 other locations where staff routinely not only met in person with students, but in many cases knew these students by name due to the more intimate enrollments at those locations. So the University Park Campus serves as the main hub for processing and customer service for almost 72,000 aid recipients with all of our locations providing individualized customer service to their student enrollees. In a typical year, we handle about 66,000 calls at our office, we answer about 22,000 emails and we have approximately 11,000 student appointments. So fast forward, when pandemic was declared, our administration asked us to move to individual remote locations to home within 24 hours.

Melissa Kunes:

We were fortunate that we had the technology and the technology staff to facilitate this transition. So we moved all staff home with either a laptop or a desktop computer, and we were able to continue to provide secure access to student record processing and customer service without skipping a beat. So conveniently prior to COVID, we had implemented a software program to allow staff to answer our public facing phone calls through the computer. And we have had for many years, a public facing email system to receive and to respond to student and family emails. This enabled us to continue to provide customer service as well as financial aid processing in a remote environment, through the duration of the pandemic. All of our staff were able to perform their job duties and do them well in a remote environment with one exception, we did have to have staff physically come into the office once a week to process any paper mail we received, although the majority of our documents we received from students and families are electronic, which was a plus in our remote work plan.

Melissa Kunes:

And although I will state that our staff who reside at other Penn State locations did maintain more of an in-person customer contact experience at their locations through the pandemic, due to the smaller campus staff and student populations with whom they come into contact on a regular basis. But we do have masking and distancing requirements. They were in effect for any person interaction at any campus, and we currently do have indoor masking requirements. So that's how we handled our transition to a remote world.

Justin Draeger:

Thanks very much, Melissa. Tyler, let's get to you. And then I'm going to circle back around some of the themes you touched on there, Melissa, but where were you guys at? Give us a little bit of your profile, and then day one of the pandemic after the national emergency's declared.

Tyler Pruett:

So we had a very similar experience to Melissa, although I will admit we skipped some beats and not as... I don't feel like it was as seamless as maybe it could have been, but it's a pandemic. It's a once in a lifetime hopefully thing. We had a very traditional financial aid approach, pre pandemic that we had just a little bit, were switching to a hybrid to handle some of our other campuses. We had four campuses. So Samuel Merritt University is a health professions university, mostly graduate students, couple of undergraduate programs, 2,500 students, four campuses that are physical and an online campus. So we were already trying to address the student services for online already. We were addressing some of the other physical locations that felt like they weren't getting the same service because all of our counselors are located in the Oakland campus.

Tyler Pruett:

So we had switched to everyone having laptops and then visiting the other campuses on a rotation basis, physical in person face to face appointments, and then virtual ones when we couldn't physically be there. For all programs where we could, we had started implementing an online scheduling system for student appointments. So we were positioned pretty much to go for staff into the pandemic. The things that were maybe a little bit difficult, and the hit list that I had of things I wanted over the five years before the pandemic that I couldn't get implemented that were maybe a little frustrating for me all happened in the first two weeks of the pandemic so... I remember early in my career someone telling me, "Don't let a crisis go to waste because you can get a lot." I've sort of lived that experience in

other places, in other sort of things happening, recessions and being able to implement things but this was incredible, the amount of things that people were able to turn around and quite quickly.

Tyler Pruett:

When it was time to go remote, I didn't think it would be a problem. We were already doing most of that. So everyone was home, they said we could take our furniture even, so people came in to do that. We transitioned to appointments. We have a service center that does our initial screening of calls. So I didn't have to deal with the first screening. So it's pretty seamless as far as that goes. Although I don't want to say we didn't miss the beat because there were beats missed, but...

Justin Draeger:

Well, let me pick up on that a little bit, Tyler, because like you said, it's a once in a lifetime thing, but what I'm sort of hearing you describe is, you had the beginnings of an infrastructure in place to be able to go remote, but this pandemic sort of accelerated maybe everything that you had planned to do. You had sort of the beginnings and then in the space of like two to three weeks, you just had to get there.

Tyler Pruett:

We did. And the things like... Well, we use Power Fades, which has... The student portal module has an upload document feature that I just couldn't get the hardware and people time to do it. And in a week we got that turned on and installed and had students starting to upload documents directly into Power Fades, which... No more mail. We just tell them we can't take it any other way right now. And now that the habit is there, it's been great. We still get outside checks so we do have to come in for that. And I have a staff member or two that switch in Oakland that come in.

Tyler Pruett:

But I can't list the things that we got that... All the paper processes that the finance department required, we got rid of, they still keep some of theirs, which I don't get. They wanted colored paper by year. It was like the old FAFSA colors every year. They used to do that. They still do that with promissory note copies, and I just refused once the pandemic became, we're going to collect those electronically. If you want to transfer them to a different color paper, knock yourself out. But I can't support that remotely.

Justin Draeger:

Right. And the transition might be a little bumpy, but in the middle of the pandemic, it seems like students and families adapted pretty quickly. And then once you've got new habits in place, they can stick with them. Tyler, you're coming from a sort of smaller school, Melissa, you're coming from a flagship state public with tens of thousands of students and inquiries. As you scale up to a larger office, I imagine you have policies and procedures in place because you have to have sort of everything spelled out because you just have so many employees and so many transactions you have to deal with. How do you go about then on the other side of this, as you guys are looking forward, and it sounds like you're still examining and implementing post pandemic, a hybrid type office, right? Some people working from home, some people coming in, how do you adapt all those policies and procedures in the way that work for everyone?

Melissa Kunes:

Well, our policies and procedures are all electronic. And we really operated from more of an electronic base really to begin with. We were required by the university... Required is too strong a word, probably requested by the university in mid-August to everyone come back fully in person, because they wanted us to have an in-person residential experience for our students because we are an in-person residential campus. And we proposed back to them that we did this work well in the pandemic, and could we continue to look at options of having a hybrid work plan? And they did approve us to do this 50% arrangement, 50% staff on site and-

Justin Draeger:

So let's talk about that, Melissa. Your campus leadership won people to come back. You had to make the case that this is working for us. What went into that case? What were the points that you highlighted in terms of we can continue to work partially in the office, partially remote?

Melissa Kunes:

Well, the beauty of our work is that it's very measurable. We have data points. This was true pre pandemic, during pandemic, and it is true now. We can track how student records are being reviewed and completed. We can track the number of phone calls we're coming in and completing. We can track the number of students who want to see us, because as a part of the shift to pandemic, we did go to an appointment schedule for our students. So students could contact us and schedule an appointment. We used Microsoft Bookings as our application to do so, took us a while to figure it out. But we do know who the students are, who want to talk to us. And we are currently giving students the option of either coming in person to see us or booking an online Zoom appointment.

Melissa Kunes:

They love the zoom appointments much better than they do coming in person. So these are all very measurable, trackable points. And that was the case we made to the university. We can be just as efficient in our remote work environment, as we can be in person, we will come in person to greet the students and the families who do want to come in to see us. So that was the tradeoff. We get to be efficient in the remote world. Yet we are still in person and social and interactive with the world where people still want to come in and talk to us face to face.

Justin Draeger:

So your staff, I assume, they were very much in favor of doing this, that they really wanted this, what I guess would be work life balance or cutting down on the commute or this ability to sort of split their time between the office and working from home?

Melissa Kunes:

Yes, staff very much wanted this. They wanted the remote work opportunity to continue. Although they did also want the opportunity to come back on campus and to be in the office because we are social beings and we do appreciate the ability to still interact with one another. So this gives a great balance. We do 50% here, 50% at home. It also gives, as you say, staff, the opportunity to have more of a work life balance. It's great for morale. It's great for processing efficiency. So I really see this as a win-win for the university and all its personnel.

Justin Draeger:

Tyler, you've talked about coming out of the pandemic, it sounds like you all are going to go a 100% remote. Is that right? And did you get any kickback from your administrative or from your staff if...

Tyler Pruett:

Well, we're planning to stay a 100% remote. I do feel like the administration is a little bit pushing for in person appointments again, but I have the tension of not having the staff to cover all four physical campuses. And if they mean the Oakland Campus, I go back to having the issue of I'm not serving the other campuses the same as everyone else. We're also moving locations. We're planning to build a campus in the most expensive market in the country, anyway, the Bay Area, we're going to build a downtown Oakland campus. And part of that is not having off offices for us because of the cost of-

Justin Draeger:

So your point here is that real estate's at a premium, and so if you don't have to build an office for everybody, because you can do your work remotely, that's savings for the institution as well.

Tyler Pruett:

Right. I can't see them asking us to come back even because other than hybrid, and I do have some staff that will plan to come in and we'll have some hoteling space where they can work occasionally. And it's not that we're not going to plan to be in person either. We'll have quarterly face to face meetings, and we still have staff meeting virtually every week and I still meet with everyone face to face virtually. I have a smaller staff and I've worked at a larger school where I had 35 staff and that maybe wouldn't work, but for a small school, that is very niche. We should be able to handle that and it'll be a little easier, I think than maybe... Just because of scale.

Justin Draeger:

Melissa, Tyler just mentioned the scale. I'm curious from your angle, are there any positions in financial aid that just don't work remote, or have you really found that almost any position can be partially remote?

Melissa Kunes:

Justin we have found that really any position can be remote. As I said, we do have the need to handle paper mail, but it's not that large of a volume, so staff can come in on a sporadic basis and deal with it. But we have found that all of our positions in financial aid can work fully remote. We did, we did that during the pandemic.

Justin Draeger:

And any concerns about staff connectivity or their relationships, or maybe the big one, and you kind of mentioned this from your administration's angle, productivity? I think there's sort of maybe a feeling that if I don't see them, then how do I know that people are actually working?

Melissa Kunes:

Well, as I mentioned, we do have measurable data points that we do evaluate to determine if we are being successful in delivering aid to students. And we were meeting all those measurement guidelines. So that truly was not a concern. At some level you have an issue of trust with staff and we had no qualms about our staff to do the right thing and to do their job, because I truly believe that our staff

want to serve our students to the best of their ability. And they were appreciative of this opportunity to work remote when we were asked to come back into the office. So I would say that the ability to work remote was a boon for them, and we never had truly any issues with a lack of productivity being an issue to consider.

Justin Draeger:

Yeah, sorry Tyler. Go ahead.

Tyler Pruett:

If I could build on what Melissa said there, I get that people are concerned about, you don't see someone in office, how do you know they're working? And I'm like, "You don't know they're working when you're there." That's not what you use to measure. You look at disbursements and now with appointments, I know who's seeing appointments. I get call volumes. And then even before that, if you got complaints about a staff member, you knew who was where you need to spend time. I don't know that virtual has really made that different. It's made the way you handle it different and maybe the touchpoints a little bit different, but it's...

Justin Draeger:

Yeah. I hear what you're saying there. What you're saying is maybe the method in which you're using to evaluate staff may have to change. Maybe you're paying a little bit more attention, but you still have a system for collecting complaints, you can still have reports that show you where the log jams are, or where things aren't actually getting cleared. And so there's still these methods, it's just the comfortability of not necessarily being in the same shared physical space with someone. And as Melissa, you pointed out having the trust that you hire good people, they're doing the right thing, they will continue to work on behalf of the students that we serve. All right. So Melissa, let's say that I'm an aid office. I'm a director. I have a large staff. I'm thinking about doing this hybrid far into the future, maybe to permanently. What do you think are the lessons I need to keep in mind? What would be the things that I need to think about upfront as we move into something like this long term or permanently?

Melissa Kunes:

Well, you do need to have the technology. So you need to have staff who have laptops, who are flexible, who can move around. You need to have secure servers so that your collective work can be secured lockdown. You need to have the ability to interact with your customers on a remote basis, be that through a Zoom interaction or a phone call that comes through your computer or an email system. So you need to have the technology. You also need to have those connectivity touch points. You need to make sure you maintain connections. Whether those connections are one-on-one via Zoom, one-on-one via Teams, or just phone calls, you have to make sure you're touching base with staff all the time. There were staff who felt somewhat isolated during the pandemic, and we needed to be mitigate that feeling of isolation very significantly because that was a concern.

Melissa Kunes:

So now that we are halftime back in the office, we are trying to make a point to connect where we can in person socially with distancing and masking in place, and also continue to connect because we do have weekly staff meetings with all staff. Some are Zoom, some are a combination Zoom and in person, but it is very, very important. Make sure you keep those touch points. Do not lose sight of staff, do not

lose connection with them. That would be the overarching message I would deliver to an aid officer who wants to create a virtual working environment.

Justin Draeger:

Yeah. It's too easy, maybe to let things go and then all of a sudden staff are losing connections or trust with one another, losing touch and we want them to stay connected. So Tyler, you're moving a 100% remote. I'm wondering, does this mean that you would look for aid office staff in the future who might not even be anywhere near your physical location? Or is it important that they are in some sort of driving or commuting distance to the office?

Tyler Pruett:

That's a good question. And I pondered it, but I guess I don't want to lose good people. So yeah, I would recruit nationwide. I do feel like they need to probably come in quarterly, so they'd have to be willing to come to campus. So that's maybe... But I'd be upfront with the people about it. I'm planning to at least be on campus quarterly. My plan was to be monthly, but my boss actually said over the last couple months, "There's no one here, don't come." And I already had people checking the mail so...

Justin Draeger:

Well, right now it's been reported and we're having a hard time getting sort of our arms around the scope of it, but every conference I go to there seems to be a significant number of openings and financial aid offices. We're kind of going through as a country this sort of great... They sometimes they call the great resignation. Sometimes it's just called the great reshuffling. And I wonder, Melissa, are you seeing any preliminary sort of benefits here of allowing people to do part remote in that it's retaining staff who appreciate the flexibility that's being offered to them to sort of be home and handle things that have to be done at home and still, but then handle all the things at work too?

Melissa Kunes:

Justin, I would say that while this is a benefit for our staff and they're very appreciative of it, we at Penn State, we are all over the state to begin with. So we have staff that work all across the state and many of them are tied to their particular location. We also have a unit called World Campus, which is our online delivery model. They have financial aid people working in the World Campus that are already across the country. Even pre-pandemic, we have staff in our office to speak to Tyler's points, that while trained and have lived here due to maybe a spouse, getting a job or a partner getting a job in another part of the country have moved. So we have already had people working across the country for our office.

Melissa Kunes:

Now, those people who live and work in the state college area where the University Park Campus is, they are they're fairly well tied geographically to this area. We did have a few people during the pandemic who moved and then came back. But we as an office will still want to hire folks who can still come into the office on regular intervals to be a part of the physical location of the office. So while working remotely is a boon for the work life balance, I don't think that we would advertise and hire folks from across the nation to work in our office because we do still appreciate the personal connectivity of when we can and will continue to get together.

Justin Draeger:

Okay. One of the things maybe tangential to all of this are the vaccine mandates, depending on what state you're in, or if you're at a certain school, and of course, then we have if you're a research university accepting research dollars, Melissa, I'm curious at your institution, how the vaccine mandates have sort of played out with your staff, whether that's played any role in whether you're remote or in person, anything along those lines for your staff or your HR considerations?

Melissa Kunes:

Well, Penn State has determined that we fall under the Biden vaccine mandate for federal contract workers. Now, not all employees are considered federal contractors, but since staff co-mingle for work projects for safety purposes, this interpretation was applied to all staff and faculty. So we do have a vaccine mandate that by January 4th, we either need to be fully vaccinated or have been given an exemption for either medical or religious purposes, students do not have a vaccine mandate and they will not at this point in time, but we do have a voluntary rate of about 85% for our students having been vaccinated. And that's across all locations of the Penn State campuses across the Commonwealth. And students who aren't vaccinated need to be tested weekly just for their safety and for precautions for those around them. For staff though, while we're going through this transition into needing to be vaccinated, we are maybe not in our office, but at the university, we are seeing some migration of staff who are choosing not to participate in this role and they will accept a position in someplace else that doesn't require a vaccine mandate.

Melissa Kunes:

So while you had to earlier about our staff choosing other work options, if they can't work remotely, I would say no to that, but where the vaccine mandate comes into play, that I think holds a higher philosophical threshold for people, and some people are choosing to work other places due to the vaccine mandate. But I would say that overall, even as staff and faculty, we are at close to, I believe in 89% overall vaccination rate at this point in time.

Justin Draeger:

Okay. Melissa, Tyler, I really appreciate your perspectives on sort of post pandemic, hybrid, working from home and meeting staff where they are while still continuing to provide our excellent service to your students. So kudos to both of you. For members who want to get in touch with you and maybe pick your brain about how to make the case to their administration, some of the policies and procedures they're thinking about, we'll leave your contact information in the show notes so they can go there and reach out to you directly. Thank you very much for coming on. All right, Hugh, what else is going on this week?

Hugh Ferguson:

Yeah, thanks Justin. So this week we had some news about a major student loan servicer that reached a short term agreement with Ed to extend their servicing contract. This announcement comes as services are looking to help ease the transition period into repayments for the new year and is just an important development to follow and for students to be aware of. So we would encourage all folks to check out our Today's News article on that and to stay tuned for additional servicing news that's going to be of utmost importance at the start of the new year.

Justin Draeger:

Great. Thank you. I understand that we had some Department of Ed officials up in front of Congress this week. Any news there?

Hugh Ferguson:

Yes. So the House Education and Labor Committee heard from James Quall this week, primarily focused on pandemic aid implementation and what Ed has been doing in terms of oversight of all those funds that Congress has approved in the last year, year and a half now. The conversation was wide ranging. There was also some discussion of K-12 programs, but there was plenty to discuss on the higher ed front. Two interesting points that were brought up was from Chairman Scott. He indicated that he'd be interested in an update from Ed on the status of their repayment pause and was interested in their briefing into what the department is doing to communicate with borrowers.

Hugh Ferguson:

And then also throughout remarks, ranking member Virginia Foxx took issue with Ed's responsiveness on document requests and just how they're communicating with the committee. So it was a wide range of conversation. We have a full recap for folks that want to check out those remarks and just see the different topics discussed. And then, yeah, just lastly on our end, we were following updates from the Department of Education on their approval of PSLF applications and folks to just stay tuned into Today's News for more coverage.

Justin Draeger:

All right. Thanks very much, Hugh. Thanks everybody for joining us. We appreciate your listening. Remember to subscribe, tell a friend and we'll see you again next week.