

NASFAA's "Off the Cuff" Podcast – Episode 370 Transcript

Putting the Financial Aid Office at the Center of Institutional Conversations

Natalie Wong:

Hello. Welcome to Voices of NASFAA, which is now being aired on "Off the Cuff". So we're no longer on LinkedIn, so we're super excited to be on this new platform while existing to NASFAA, but new to Voices.

Today, we have two wonderful guests with us from the University of Tennessee Knoxville. We have Kerline Eglau, Assistant Vice Provost of Financial Aid Initiatives and Chief Financial Aid Administrator. And then we have Daniel Matamoros, Director of Financial Aid and Scholarships at the University of Tennessee, Knoxville.

Today they are going to talk about turning OB3 implementation into a campus-wide collaboration. Major financial aid implementation cannot happen successfully within the financial aid office alone. As institutions navigate the OB3 changes, leaders at the University of Tennessee, Knoxville have worked to intentionally bring financial aid into a broader institutional conversation and build campus-wide ownerships of implementation.

Today, Kerline and Daniel are going to show us how they gained institutional buy-in and engaged executive leadership and develop partnerships that helped position the financial aid office as a strategic campus partner.

Daniel then takes us inside the financial aid office to explore how collaboration is translating into implementation from campus trainings, student communication, institutional guardrails, and sustainable approaches to staff care. The conversation highlights a larger lesson for the NASFAA community. When financial aid has a seat at the table, institutions are better positioned to support their aid professionals, anticipate the impact of change, and successfully serve students through major implementation.

So I wanted to start by giving our two wonderful guests a time to introduce themselves. So if you could both tell us a little bit about your roles, how you work together, and what brought you into financial aid.

Dr. Kerline Eglau:

Okay. Well, good morning, or what time zone you're in, good day. I serve as the Assistant Vice Provost for Financial Initiatives and Chief Financial Aid Administrator here at the University of Tennessee, Knoxville. In my role, I have the honor of serving as part of our executive leadership for the overall Office of Financial Aid and Scholarships and our Center for Financial Wellness. And together, those areas support an annual financial aid portfolio of more than \$430 million in aid.

And my connection and how I got started in financial aid is deeply personal where I started off as a first-generation college student, so everything about higher ed and its roadmap made no absolute sense to me. So I learned on the go, in the moment. And financial aid had a special place in my journey where I couldn't determine what it felt like to understand all those numbers on the paper and make it make sense.

So in my journey, I ended up being in financial aid wondering how can I help students navigate their financial aid journey a little bit differently as most first-generation students find themselves in. And my work with the director serves, we are closely connected in the work that we do where I focus on institutional strategy, a lot of the executive alignment, advocacy, resources, and doing what I can do best as possible to remove barriers in the work that we're able to do.

Daniel Francisco Matamoros:

And for myself, I mean, so I'm a recent Director of Financial Aid. I just started this position starting January of this year, which is super exciting, transitioning into this role after a pretty long tenure supporting different positions and a growing basis from the front lines all the way to now we're seeing a pretty significant substantial team.

Now while Kerline and I come from fairly different backgrounds, it's always so delightful hearing her speak because in many ways we have so much alignment in the things that we're really passionate about, being both first-generation students.

I myself am from a pretty big family, so I'm the second oldest out of 10. And I think in the first conversation that we ever had together while I was interviewing for this role, I think one of the things that always struck me is that we both share in this framework of lifting as you climb and consistently being a resource, being a presence, being a support, even as you yourself are figuring things out in a meaningful way. Making sure that that next generation, the individuals that come after you will always have a better, easier, clearer pathway moving forwards. And that's only possible because of all the efforts of the people that come before you guiding the way and suffering through some of that in some meaningful way. And so that's always been really delightful.

I also joke that even though I'm from a big family, we never got a TLC show. So I feel like I missed out on a big part of the American experience, but here we are. So it is what it is. But yeah, again, using that as a reason, I also like to joke that I'm in my Eras tour in that I am trying to do everything within my power to make sure that the students that we're supporting have a lot of the supports and a lot of the engagement and a lot of the connection with our offices in ways that I feel like I could have benefited from while I was going through my own journey as well. So using that as my why that ultimately informs how we implement the work, using and really leveraging and maximizing all of the resources that folks like Kerline are able to acquire for us, I think that's the thing that guides our light.

Natalie Wong:

I love both your stories. And I think that leads me into my next question is how do you think your professional journeys have shaped your leadership approach in the work you do today? I know Daniel, you touched upon it, but if you wanted to share anything else. Same with you, Kerline. If you wanted to share anything else about how you think your leadership style was formed by your own experience.

Dr. Kerline Eglau:

This is always an interesting question because I never thought I was forming my leadership approach until I got into my next role and I found myself not necessarily adjusting, but learning a little bit more about me through the institutions I serve.

So I've served over several different institutions, including a Hispanic-serving institution, a large community college system, private universities, and now a flagship public research institution. And each experience, I will say, has reinforced something a little bit different where context matters, relationships matter.

Last, and most importantly, the more I understand what financial aid or what financial wellness means to not just our students, but to our institutions, but also to our staff, it changed my shared understanding but will always remain at the core that I had to learn along the way in my journey. I can't say I walked into my journey this way, where I had to lead with listening. Transparency looks a little bit different depending on the audience, but also learning how to navigate what does transparency look like, and most importantly, what does shared ownership look like?

So during periods of major change, and I'm here to say we've all felt different, a major change, but people always needed clarity, including our students, our staff, about what we know, what remains in development, what decisions are approaching, and overall how our expertise or their expertise contributes to that outcome. So in each role, I found myself learning more and more about the why. Why was it so important? And that helped me shape my leadership and what I focused on for advocacy or what does removing barriers look like.

I also think for me, leadership required me to learn how to connect the dots. I can't say I walked in understanding connecting the dots, but in the work that we do in financial aid, folks always thought we were like the office of knows. And so learning how to connect the dots helped me reshape my messaging or the representation of what visibility looks like for federal policy and how does that connect the dot with enrollment strategy, operational needs, executive decisions, what does institutional risk look like.

And then once I was able to shape that, I think it naturally shaped my leadership. But I can't say that I walked into my journey understanding what leadership looked like and how I was able to evolve in each institution. And also I had some really great mentors that also helped shaped me along the way. And they didn't know that I chose them to be my mentor. So I was silently in the background saying, "You're my mentor," because I just love the style of how they delivered information in general.

So I would say that was my leadership approach, and I think it has helped me along the way understand. And the moment I learned how to connect the dots was golden for me. Before, I found myself struggling. But once I learned how to connect the dots, the adjustment to the needs of every institution was always the same. They want to serve students. I want to do the same as well. And I'm in financial aid and you're in enrollment management and we all had that common goal. So that's how I would say my journey was like.

Daniel Francisco Matamoros:

Now for me, I've been incredibly lucky because I was selected to participate in the Developing Leaders Program. I was in the cohort of the '21, '22. And if there's any experience that has shaped fundamentally my trajectory within that profession, I can always come back to that, the mentorship, the resources, the care, the support, the attention that I received throughout the course of my year there.

It's also amazing to participate in a program where you're surrounded by excellence. I think I actually did my research on this. I think every single individual within that cohort is now either a director of financial aid or in high levels of association leadership within their unique region. And again, just how inspiring it is to be surrounded by that brilliance and then having those kind of human interactions with them throughout the course of that experience was always great. So shout-out to that program. Also, by the way, the applications are open and they're due September 30th, so I got to give that a shout-out, make sure people actually go in and apply for it.

Because I will say this, one of the things I learned from that experience that shapes me even to this day, the training that we received for tracking legislations as they were in the process of development, that in itself is a massive cheat code because by the time a regulation actually gets put into implementation, you've been following every single step along the way. You've been hearing the conversations, you've been involved and engaged in what's coming down the pipe so that there's no surprises. You come to the table and you're like, oh, actually this could have been a lot worse than what we were thinking it was actually going to be. And so you have all of this time, all of this extra space to think thoughtfully around what these changes are going to mean and then how to put them into implementation.

And obviously the opportunity to get the FAAC certification has been instrumental as well. So all of those components within the program really shape who I am, where I'm at, how I'm doing what I'm doing. And again, I can't give enough shout-outs for all the benefits from it as well.

Natalie Wong:

Amazing program. Applications open, as Daniel mentioned. But no, I agree. I think mentorship is so important in this career path because it's so niche. So I totally agree. I was always watching everyone who was around me, observing, picking up things that I like, things that I was like, oh, that's a great tip. Learning from others is great because there's so many different places you can learn from when it comes to financial aid. So I think that's a great point.

But one thing I did want to dive a little deeper on, Kerline, is you talk about how you learned how to connect the dots, which I think is really important when you think about implementing OB3 on the campus. So when these changes first came into focus, how did you communicate that this wasn't simply a financial aid issue with your administration but something the institution needed to address together as a collective group?

Dr. Kerline Eglaus:

Definitely one of the things I will say is that we are probably all lucky. We probably didn't feel lucky at the time, but FAFSA simplification definitely opened a lot of eyes. So by the time I joined the University of Tennessee January of last year and July came rolling around, my campus community was, at first they were wondering, oh, this sounds like more like a financial aid situation. And not that they were all hands-off, but they were really focused on how can we help financial aid?

The turning point came in when I began mapping the provisions and how each area, there was an institutional response or a consequence that would be tied to it. And that's where the turning point happened when they were like, oh, it's not just about student loans. And a roadmap or a student journey or a departmental journey was really where they realized that the conversations needed to shift away from how do we help financial aid navigate these journeys, but really how can the institution help navigate those journeys?

So the conversation began with what are all these federal loan limits and how is it going to impact affordability? And it quickly became about discussing about graduate enrollment, program affordability, what does student borrowing behavior look like, what kind of technology and strategy and communications we need to focus on. And then the discussion about accountability metrics also helped merge in some of the academic programs, career outcomes, internships, advising.

So again, once we started really mapping out the provisions and getting also my general counsel involved to make sure that I was interpreting what I was hoping to understand, once we got all those connections, the path became clear that financial aid, we would focus on essentially what it would look like to have the operational expertise along with the regulatory pieces and implementation would depend on the expertise from across the institution.

And one of the things that I was trying to make clear, and it was not a fight at all, it was, yes, you're right and now we understand those dots and really trying to think of financial aid can't see all the blind spots. So we needed a support system or maybe more of an ecosystem to build on everyone's expertise, knowing that our expertise might be limited in the lens. So we needed our friends in veteran services. We needed our friends in athletics. We needed our friends in student success and also the colleges to help us shape the story about what would impact look like so we in financial aid could tailor reporting and operational needs a little bit differently.

And everyone was on board to focus on preparing and understanding and not necessarily rushing through the process and really taking our time to understand the impact. So there was a lot of preliminary data. We were talking with lenders, I mean very, very early on before NegRegs even started. So we were really, really data-driven and trying to understand what would the impact look like before we even had finalized updates, but we were really excited to dig in and make sure that we had no surprises or we could reduce the amount of surprises because no surprises is almost impossible.

But I will say we were able to tell our story or start the story narration through a lot of the data and conversations that we were able to achieve by having a seat at the table and telling everyone else to join in because a financial aid matter is not just a financial aid concern. It truly is an institutional response that's needed.

Natalie Wong:

And if I could just ask one more follow-up to that, how do you think you got that initial seat? Because I think a lot of campuses are struggling with getting that seat at the table so that they can have their institution buy-in to give the level of support that we all know they need. Because to your point, this was not solely a financial aid issue in itself.

Dr. Kerline Eglaus:

I will say that at my campus, the moment they heard financial aid or anything to do with loans, they all looked to me and were like, "So what's next, Kerline?" And I was transparent enough to say at most times, "I don't know. We don't know." And I was also somewhat brave enough to say what I would need. And what I would need would be everyone to be supportive in knowing that we may not always have all the answers, but together we would be stronger in navigating what you're good at.

So for example, federal regulation and policy understanding and understanding the scope was probably someone else's expertise. They loved it. This is what they did. And I'm like, "Well, tag, you're it." And we all just leaned in on, "Well, Kerline, what are you not strong in? And we can help compliment that."

And I had to be brave enough to also realize that I couldn't do this by myself. I needed their support because I knew that would help with the buy-in. Whenever something last minute changed, they would understand the last-minute changes, and getting them early in was before it became even a, is this possible that it would pass, I was already monitoring and sharing updates and giving a heads-up that this is down the pipeline and this is what it would look like.

So I started early, and I did not wait to say once the law passed and then started sharing the story. We were tracking it all the way along. And I will say that on my campus, I was very fortunate to have a campus community that was sometimes a bit overeager, but they were eager because sometimes that overeager meant you're taking action before you even knew what was down the road. And we were okay saying, "Let's push pause and let's start in somewhere else that we feel a little bit more confident with."

But I will say starting early and having those conversations. And sometimes they would say, "Oh, are we sure we're not too early?" And I'm like, "No, you just never know what Department of Ed and how some of these things can change quickly." So I will say getting involved early and probably in some kind of way inserting myself in a space that could probably feel uncomfortable, but also knowing that the uncomfortable was what we needed because we had several months of uncomfortable. So by the time it all started to play out, we were all used to feeling uncomfortable in not knowing what that would look like.

So I would say starting early was a place that worked for me and inserting myself not as the sole expertise, but saying, "Hey, again, here's the journey that I think could happen, but here's where most importantly, all areas will be impacted," so getting that buy-in was probably key by starting early.

Natalie Wong:

Thank you so much for sharing that.

Dr. Kerline Eglaus:

My pleasure.

Natalie Wong:

I know it'll be super helpful for our members to hear your journey and how it's brought you to where you are today. With that being said, so Daniel, once you had established that larger institutional support, what did implementation actually look like for your financial aid office?

Daniel Francisco Matamoros:

Man, so two things to say, right? Some of the things that Kerline is absolutely instrumental and excellent at is she's able to take the language of the institution, or mission, vision and values, and then connect them to how we can leverage some of those strengths in the organization that's been put into effect when we went through the initial rounds for implementation.

So we're a strength-based campus. So we do CliftonStrengths. We do that as a big component. So having her be able to say it's like, okay, great, we put so much focus institutionally on the strengths that everyone brings into the table as we divide and conquer specific problems or situations. She then went on to develop a framework where we had seven different committees tackling the OB3 problem from different frameworks.

One is, okay, how does the OB3 changes impact the student life experience? How do the OB3 changes impact our systems? How do the OB3 changes impact our current compliance and assessment of risk? How do the OB3 changes impact our future projections in terms of our data integrity and how we are leveraging data to make data-informed decisions? And so she gave me that incredible framework.

And then from that, we were able to put people from all throughout campus to provide feedback and to provide implementation suggestions, which we then brought back into our team in different spaces to trouble through, okay, these are the ideas that the committees are suggesting, what is the viability of those ideas and what does putting them into implementation ultimately look like?

The other thing that has been really helpful, so Kerline was able to advocate for specific days of training where we could essentially, as an office, close shop and just say, "Hey, we're going to do an office-wide retreat." And doing this specific retreat we were able to do high-impact discussions, bringing all of the brilliance from our space together to tackle through components of our implementation.

I think one of the things that was really helpful is back in March, in our March spring retreat that we put into implementation, which by the way, it was like two months into me being in the job, which was also funny, we were able to do one of the most impactful things that we're still driving dividends from. Which was we had a pre-mortem discussion where we brought the team together and essentially asked a question, "Hey, seven months from now, eight months from now, let's say that we failed in our implementation. Why did we fail, and what were the components that we can start breaking apart right now to then avoid those failures to buttress those specific spaces and to make sure that as we're going into this?"

The staff seem to have really appreciated that because also everyone loves criticizing something. So at the end of the day, leveraging those conversations and saying, "Hey, if one of the critical points of failure was our communications with students, how are we bolstering that in meaningful ways," which we can always talk through later.

But again, it's just being able to develop and create spaces where we could struggle through things and through our interpretation in a private space where we can have the safety of messing up and being like, "Hey, I don't actually know what this means. Does anyone here know what this means?" And then being able to leverage those conversations to then have more public-facing conversations, so okay, based on these spaces where we struggle through this, this is where our implementation is, and then this is how we're connecting with the rest of the broader financial aid community to bolster how our interpretation is looking into these things towards implementation purposes. And now that we have that background, we can then bring it back to our staff and say, "Hey, given this information, how can we make heads and tails out of it to chart the path forwards?" And I think to that degree, that's where some of our successes have driven from.

And also giving us plenty of time to make mistakes because that time gives you enough time to correct those mistakes before formal implementation goes into effect. I mean, sometimes we tend to be really cautious in terms of, well, we're not going to do anything until final regulations go through or we're not going to do absolutely anything until we have some sense of certainty when we realize that certainty wasn't going to arrive until after our students were on campus. We got moving, right? And I think that was incredibly helpful because it also helped us understand where we could and should pivot.

Natalie Wong:

Thank you so much for sharing that, Daniel. One thing I do want to ask you about was what are some of those successes you saw from all those scenario planning and what actually came to fruition and was a huge success on your campus?

Daniel Francisco Matamoros:

So a couple come to mind, but the one that I think really made our implementation transformative is we've had conversations around what communications look like for our students. And at the time, I think I was rereading *The Hitchhiker's Guide to the Galaxy*, so this kind of thing became present to mind.

There's a scene within the book where an alien race shows up to Earth and tells them, it's like, "Hey, we're going to destroy your planet to build this highway to go in through this intergalactic thing." And then everyone on Earth is panicking, right? It's like, "Well, what? You can't just do that." And they're like, "But we gave you 17,000 light years to be able to read this one notice that we posted in the basement of some system 17 light years away. It's really your fault for not making your way over there to read that notice to understand the details to prepare yourself for this moment. So how dare you be upset?"

And so that to me is a funny way of thinking through. It's like, well, okay, cool. How do we reach our students where they're at? It's not enough to just build a website and publish the information and have it readily available there because not everyone knows that that website exists. Not everyone's actively looking through our systems to try to find that information. It's not good enough to just send an email to communicate that information to our students because oftentimes emails might go unread or they might just be bombarded by so many other notifications that that information just becomes overwhelming.

And so some of the other guardrail communications where we tried to connect with students where they were at is, well, we intentionally build into our orientations two to three slides to talk about the

upcoming OE3 changes. So that was a partnership that we had to do with admissions and with our one stop to build that information into those presentations.

Separate from that, we started collaborating with our OIT and our systems team to start listing little notices. So there's like a one-sentence notice when students log into their MyUTK portal, for example, that says, "Oh, and by the way, because of recent regulations, changes to enrollment intensity might impact your aid eligibility." Once students actually click on their financial aid portal, there's now a longer attestation at the top that's a paragraph in length that walks them through some of the basic changes.

And then if a student goes through the process of trying to withdraw from a class, we now have a pop-up at the station that they have to actively acknowledge and accept, and we record their acknowledgement. And in that acknowledgement, it goes more into details like, "I understand that changes in my enrollment intensity will impact my aid eligibility future subsequent terms."

And so making sure that those handrails exist in every moment of those student interaction situations and engagements, that has been really helpful. Not because we're here trying to remove from students the possibility to tell us, "Well, I didn't know." But rather because we want to make sure that where students are, that messaging is being present and provided to them.

Dr. Kerline Eglaus:

And then I'll add to that on the executive side, some of the successes that I'll say that was beneficial was starting that data review early. That was also helpful for us so when implementation happened, we were able not only just to communicate to our students, but we had been communicating with our campus community months in advance about what the potential impact could look like. So we started that story building very early on.

I mean, I think prior to Daniel's arrival, I was already in different meetings, having conversations with my VP, having conversations with other associate and assistant deans. We were having conversations with student success. And some of those spaces that was very successful to see it happen through was once we got into the January, February, March mode where it was after December, NegRegs had started, we were getting a lot of different versions of what could this mean for other campuses, we were very successful in having those conversations because we were equipped with knowledge, with data. We did not wait behind of let's wait until we get some finalized pieces. We mapped it out and projected what we think it would've looked like had the OB3 been implemented last year. Had it been implemented two years ago, what would the student impact look like?

So we were able to share with our graduate school or our law school or our vet med school to start those conversations early so when implementation started, it was no surprise. They were like, "Let's roll up our sleeves. We know we're in this together." And for someone in my role, that's always very enjoyable, especially for financial aid because sometimes it can feel a little lonely in carrying that weight. So I'll say that was a successful piece.

Obviously, you don't know what you don't know in that moment, but months later to see everyone together saying, "Hey, you're not in this alone because we knew about this in July. We knew this was coming. We had an understanding why this was so heavy." And I think whenever things happen, like the time the credential definition changed or our SIS systems were still behind on trying to update the systems, our campus was empathetic. Our spaces were very understanding, and they were more than happy to jump in, which I'll say in my experience has not always been that version of it, versus we were a lot more proactive versus reactive.

And this is not to say there weren't moments we were reactive. There were a lot of moments we had to react because something broke and we did not see that through. And I think because of that early buy-in

of understanding how challenging and how complex this will be, a lot of the campus response wasn't, "Why didn't you know this before? Why didn't you see this in advance?" They were like, "We knew this was happening. We understand. We empathize why you're in this space. So how much grace do you need? How much space do you need? What kind of time do you need off the phones?" And they were coming to us saying, "We know you're going to be stressed out in July, so how can we help support?"

And I will say that was a response that, no matter how much you prepare in advance, sometimes the proof is when times get tough, how do you respond? And I will say I'm excited to be a part of a campus that responded in ways to support us versus... And this is not to also say that people didn't panic. We panicked. We definitely did panic. We were panicking like, oh my gosh. But the panic was, okay, we're done panicking. Let's get into fix it mode and what can we do to provide you the resource in time?

So I think that's a different level of success outside of implementation that I'll say was the campus response was part of some of the successes. And there was a lot of tough questions asked, and I think those tough questions that were asked help us also know how to navigate a little bit differently and sometimes in a very student-focus. We also thought about the campus, about our first-year students coming in, our graduate students, our transfer students. We were thinking of different lenses and that was all to the data that we were able to see as well.

Natalie Wong:

That's amazing. And I think that you highlight something very important, how you were able to build already that empathy and support for the team members doing the work because I do think that's a challenge in large implementation is team members feeling overwhelmed and not having that support from others. So I think that is a testament to you that you were able to build that so everyone felt supported throughout the experience.

And just to touch briefly on it, Daniel, I know you talked a lot about how you were supporting your team through the implementation. Do you mind just sharing a little bit more about what that support looked like within the financial aid office?

Daniel Francisco Matamoros:

Well, two things. First, you're never too busy to make your staff feel seen, cared for or to create spaces of belonging and support. I mean, even throughout this whole entire period, we've intentionally built spaces to celebrate retirements, to celebrate transitions, to... I believe actually Kerline put together a Hot Ones Challenge thing where we brought hot wings for lunch for the office and then we had questions that we would ask as people were trying different hot wings. Things like that because at the end of the day, yes, things are really busy, but you have to eat, and you have to create space to give people the opportunity to come together and to recognize that regardless of how challenging things are outside. We as a unit can get to it together as long as we give each other that kind of space for support and attention.

Then there's other things because one of the things that has been instrumental in our discussions around what staff care looks like is we from the get-go did not want to get to a space where we did moments of brilliance. For example, just have one big pizza party and then all of a sudden that changes nothing of the fact that, well, I still have to go and get yelled at by a parent, and I still have to go and process 600 different adjustments in the end of the day. And so you have these moments of reprieve these little oases and then you have to just go back into the desert and that's really miserable. So how do you combine sustainable care engagement to our staff? And we had to be really intentional about that.

Some of that looked like from the moment coming in, really cleaning up our staff little kitchenette area, getting us a coffee maker that made really good coffee so that sustainably day after day people could at least say, "At least this is the one thing that's really good." Other things is just creating moments for extra support that looks very differently because you can't just get ice cream for everyone. You have to be conscientious of the fact that there's people in your office that are diabetic, there's people in your office that are gluten-free, there's people of your office that are allergic. And so we actually transformed July into Joy Live so that every month we could have some initiative that was really attentive to the needs of our staff.

So we learned that there is a program within our campus, with our vet office that takes shelter dogs and then trains them to be therapy dogs. And so we collaborated with them to bring a set of therapy dogs over to our office to really leverage those campus resources for those purposes. And so we had people just laying on the floor getting some puppy therapy and that was delightful. So that's not to say that there's a certain boldness that has come out of that, and you have to be willing to be a little cringe from time to time, being willing to embrace components of that. But I mean, it really has been so transformative.

The last thing that I'll say is also making sure that staff get their flowers. I think by now TASFAA, which is our Tennessee Association, they're probably sick of me sending staff spotlights to include into their monthly shout-outs because I send one basically every other week, and it's like, yeah, let's give flowers to our champions. Let's recognize those people who are stepping up in times of challenge and difficulty and let them know it's like, hey, we see you. The work that you're doing is instrumental, and it's fundamental in the way in which we can carry this work forwards.

Dr. Kerline Eglaus:

And I think Daniel, you illustrated that really well. And I think another part about it was we asked the team, what does support look like? What would be most meaningful to you? And some of it was can we work from home a little bit more? Can we get a half day to just have the space and time where we're not on the phones, we're not juggling it all, we just have a moment to breathe?

Some of it was just as simple as we want to be seen for not just when things go bad, but we want to be seen for all the things that are going well, and this was very difficult and challenging. So we also had to ask the team, what does support look like for you and cater to it based on that team's need? And it may not look the same across the board, so there was never any level of a fear of missing out because another team had the ability to work from home for a week, for example. So we also tailored to what does support look like for you?

And most of the time they just wanted to be heard, they wanted to be seen, they wanted to be valued. And what does that look like was just not just waiting when the stress was there. It was also the times leading into it because year-round is there ever a slow time for financial aid? No. So it's year-round busyness. So honestly, it was also sometimes taking a pause and saying, "Do you like this? Does this look like support? Do you want more fun in the office, a little bit more flexibility?"

So once we started asking more questions, I think it also tailored to reaching at the pinpoint of what joy looks like to them. That I would say some of the spaces that I was able to also advocate to my other exec partners to say, "Hey, guys, whenever you see someone in financial aid, give them a word of encouragement. Come down and visit them. Say hi. Have fun with us. Come join us with our coffee drinks. Come join us. Don't just wait until the stress is happening. Visit us while we're doing all of this work."

And they did that. They'd come down. They'd have fun. We know how to have fun in financial aid in general, but I think it was a special kind of campus community fun when we all got together and saw

each other and even just took a moment and say, "You're doing a great job and we appreciate you." And I think that also went a long way because they were surprised by that because they just didn't feel seen in a way that spoke to them.

Natalie Wong:

I absolutely love that. I think to your point, sometimes just asking is the simplest thing you can do and makes the biggest impact. Also, love the coffee idea, and it's something that isn't just one moment in time. It continues every day. I really value those ideas you just shared and I think our listeners will too, and some of them will implement them on their own campuses.

Daniel Francisco Matamoros:

And I will say the coffee maker also has a separate thing that makes hot water for our tea drinkers, so we did not forget about our tea drinkers.

Natalie Wong:

You thought of it all.

Daniel Francisco Matamoros:

Everything.

Natalie Wong:

I love that. And just to close us out today, you both, I just want to ask you one final question. What's giving each of you optimism about the profession right now?

Dr. Kerline Eglaus:

I'll go with some of the things that I will say that has given me optimism is really thinking about how I've been able to see not just... I think there's some excitement about financial aid and there's some fear about financial aid. The fear is like, oh my gosh, there's so many changes going on, your area's burnt out. There's some fear.

But I think what gives me optimism is knowing that I'm able to see at the state and regional level how we are able to come together. And I think once we're able to come together and we see that we're suffering together, we're learning together, we're exchanging ideas together, I think that togetherness, I've seen a lot of new financial aid professionals come in and they're like, "This is not what I thought financial aid was like. I thought you financial aid folks were boring, all about the regs, just sticklers for numbers." And I think once they see how, I won't say protective, but in its own kind of way we're protective of each other, we understand each other's... And we're a vocal bunch. I don't think people realize how vocal financial aid can be in general. So I think knowing that our voices are being heard across platforms like this "Off the Cuff" episode, I think also sheds light to that we're not just always the campus or the department that says no. There's a reason why.

And believe it or not, we try to find ways to get to that yes by working together, by collaborating. And honestly, sometimes by even having fun together. There's been some associations that I've joined, they're like, "Let's go ahead and have a mock happy hour online and we can just brainstorm about OB3 and what we're struggling with." I think that debunks a lot of myths about what people think financial aid is about, is when we're able to get together, not just in moments of crisis, but also just getting together just to learn with each other and learn from each other like we're doing off on this episode.

And I think the more this reaches a lot of other people, they'll realize that financial aid, we are our own version of the heartbeat of the student journey. The student journey is almost impossible for a lot of students. When we work together and when we are at the seat of the table early on, the student journey is far much different.

So I think the more we continue to show that we are a unit that focuses on student success as well, and we also know how to have fun with it as well, I think that also helps with the optimism because federal changes and state changes, that happens all the time. There's nothing that we can do about that. But do what we do best within our control, which is everything financial aid and affordability, I think it has helped a lot of people say, "You know what? I think I might make a career out of financial aid."

And I'm always surprised because we all know we usually fall in to financial aid and make careers of it. So when I hear someone say, who's very new in the financial aid world, and I have a person that comes to mind, and he's like, "I did not think this is what financial aid was about. And while it is stressful, I actually enjoy it." And that gives me optimism because I know that there's other individuals behind us that will come in and bring their own spin to what financial aid looks like and implementation looks like.

And that's what excited me the most about Daniel. When we met, it was like, "Oh, we're double trouble and we're going to have fun with it." And so I think, again, optimism about the future of financial aid, it's always there.

Daniel Francisco Matamoros:

To Dr. Eglus' point, it takes a very special kind of person to look at a fire and run towards it instead of away from it. At the risk of comparing our profession to firefighters, at the end of the day, that's what we do, and it's so encouraging to see people thrive in those spaces.

The other thing I will say is that even from one of my first experiences in financial aid is I was asked to do a high school financial aid presentation for a local community. When I was moving into it, I was called in as an emergency replacement because the person who was originally asked to do that was sick and had to go out, so they couldn't do it anymore. And so the night, it was just like, "Hey, this is a night off thing. Roll over and go do this." I was like, "I don't know if I can do this." And then I reached out to a friend within the profession, they were like, "Oh yeah, you absolutely can do this. And not just can you do this, here are all of my slide decks and here are all my notes for the presentation and here's everything that I've ever used to be successful in this initiative." And I went and I knocked it out of the park.

The reckless generosity that exists within this profession is so inspiring. A lot of the resources that we've developed through our office this year are so good because we've been sharing them out broadly to other representatives and through that peer development and peer comment and sharing of like, "Oh, but have you thought about adding this paragraph for this particular compliance purpose and all these things?" Having that feedback then shape getting to closer levels of perfection as we're going into implementation, that's been fundamental.

And all it takes is looking at the Slack communities or looking at all of these other spaces, networking at conferences. People are recklessly generous with their knowledge and their experience. And obviously, that makes it easy to look like Jordan. When you got Pippen and the whole profession throwing you nothing but dimes, it's amazing. And so finding ways where we can be that for others I think is my task and what I'm seeing as the light for this year, while also at the same time not hesitating to lean in and really receive that care, support and attention from those within the profession. So, yeah.

Natalie Wong:

Well, I think that was a wonderful note to end on, and I could not agree more that this community is so special here within financial aid. And I think you both summed it up beautifully what is so important about the peer-to-peer engagement and having one another through these different times that we go through in the industry. But I agree, financial aid people are fun, and this was such a fun conversation, but so meaningful and so insightful. Thank you for sharing your brilliance with all our members, and it's truly been so wonderful to be with you all this morning. So thank you.

Dr. Kerline Eglaus:

Thank you, Natalie.

Natalie Wong:

Yes. Thank you so much for listening to another episode of "Off the Cuff". This one is featuring Voices of NASFAA, and we are so excited that you're listening.