

Illinois Association of Student Financial Aid Administrators – 2009 Annual Conference

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March 22, 2009

Background: *The Illinois Association of Student Financial Aid Administrators (ILASFAA) is a professional association that consists of more than 500 members representing 150 Illinois higher education institutions and more than 50 state and federal agencies and lending institutions. ILASFAA provides professional development and leadership opportunities for members as well as a variety of networking and training programs. Paula Luff, DePaul University's assistant vice president for Financial Aid, is currently president of ILASFAA.*

THE ROLE OF THE FINANCIAL AID OFFICER IN TODAY'S UNIVERSITY

Introduction

Many of you serve this organization and other associations with countless hours of dedicated effort, energy and professionalism. And some of you do it despite a lack of support or even acknowledgement from the leadership at your institutions. It's not uncommon for senior leaders at colleges and universities to take for granted the commitment their staff makes to keeping their various professional communities alive and vibrant.

At DePaul, however, we not only support and acknowledge professional service, we applaud it—so I'd like to begin my time at the podium thanking Paula Luff, assistant vice president for Financial Aid at DePaul, for her leadership to this organization and acknowledging the pride the entire leadership at DePaul has in the fact that her professional peers have recognized her and asked her to serve in this leadership capacity. Paula, I know your colleagues in the room appreciate your leadership; I want you to know how much all of us at DePaul do as well.

These meetings and these organizations are increasingly important in these times. It distresses me that one area where institutions immediately cut budgets in tough times is the professional development of their staff. Of course, you all know the value of the social and professional networking and the professional development that occurs here.

While I wouldn't want to diminish those outcomes, I think that the greater value of such meetings is the following. Meetings like this one are the annual reminders that we are doing something that transcends the goals and purposes of our individual institutions. They are an acknowledgement that the goals and values that motivate and energize us are things that cannot be achieved by any one institution but rather only by us all working together as a professional community toward shared goals and mutual objectives. While we are in a hyper-competitive environment, meetings like this are proof that we are in pursuit of outcomes that transcend the specific interests of our respective institutions. It's for the greater good. That's why we come together and share, discuss, teach and learn together. I applaud all of you for your commitment to that end.

I appreciate the invitation to join you tonight to kick off this annual conference. Of course, whenever I agree to do these things, I find myself wondering what I could possibly have to say that would be relevant to a gathering of professionals who specialize in an area I know so little about. As Paula would certainly attest, there are few who know less about the wonderful world of financial aid than I do. I think the difference between me and most senior enrollment management officers is that I'm pretty quick to acknowledge my meager understanding of the world in which you live. I respect it—I honor it—I just don't get it.

So I found myself wondering what I could possibly say that would be relevant; then Paula reminded me that having nothing relevant to say usually doesn't stop me from giving speeches. So here I am.

Paula suggested that I comment on what I see as *the role of the financial aid officer*—especially from an enrollment management perspective. I have confidence in my ability to offer such comments, and do so in a way that might be relevant and valuable, because I recall a conversation with your colleague Janet Hunter back while she was at Knox College years ago. Janet was inviting me to speak at a national financial aid meeting about a

dozen years ago, and she confided that I was one of the very few chief enrollment management officers she'd ever met who seemed able to talk about financial aid and to financial aid professionals in a way that doesn't offend them to the very core of their professional identity. I wasn't sure exactly what she was trying to tell me, but I took it as a compliment.

When I reflect on the role of financial aid in our colleges and universities—especially in these unprecedented times of change and challenge—my musings and observations tend to go off in directions that have very little to do with financial aid per se and are much more about the opportunity and obligation that financial aid professionals have to influence institutional outcomes far beyond the confines of the financial aid process and the financial aid function.

I suspect that your opportunities for impact aren't because financial aid itself is becoming an increasingly pivotal—and political—dimension of higher education leadership. No, it's not what you manage that defines your role; I think your role is much broader and more compelling than that. So as you kick off this important conference, let me share with you my reflections along these lines.

I start these observations by thinking first and foremost about what your role is not.

Your Role Is Not Defined By Your Position

First, your role can not possibly be defined by what your job is. In other words, your role is not adequately defined by your position. Your role is not something depicted on a classic organizational chart. Organizational charts are designed to clarify management control—the scope of responsibilities on the horizontal dimension and the supervisory hierarchy on the vertical dimension. That's what they are designed to do, and that's what they show exceedingly well. Using our job descriptions and our positions to define us is pretty common and convenient, but they don't do a very good job depicting roles and responsibilities.

In fact, one of the greatest impediments or obstacles to anyone realizing their optimal role in today's university is the tendency to equate a role with a job, to see themselves as occupying a "position." People often think: "This is what I'm hired to do—so this is the extent of my role and responsibility."

But all you have to do is pick up the newspaper these days and you see how many great organizations have crashed and burned before our eyes because everyone accepted their job description as being their role. They did their job dutifully as their organizations plummeted in a death spiral. Someone once said: "In a rapidly changing environment, a company can go bankrupt while all its employees are doing their jobs perfectly." Today's daily news is proof of that.

So I start this search for a sense of your role in today's college and university environment by affirming that it won't be found in a job description or an organizational chart. Your role is not a position.

Your Role Is Not Defined By Your Profession

Secondly, it's not uncommon for financial aid officers to talk about their responsibilities as a profession when asked to describe their role.

As the work of this association so clearly demonstrates, the professionalization of roles and responsibilities serves a valuable purpose in today's higher education industry. Professionalization of any task serves to ensure a consistency of practice and a standard of performance that's increasingly necessary. The professionalization of any work provides the guidelines and standards that make increasingly complex work more effective and efficient; as long as our staff are adhering to professional guidelines, the actual day-to-day task of managing each task is minimized. It's the profession that provides a kind of oversight, consistency, quality and ethical practice

that's otherwise impossible to manage. The professionalization of work creates great value since it establishes a set of external criteria to which professional staff are accountable and show allegiance.

However, I'd encourage you not to use the notion of the financial aid profession as the only way to frame and define your role and responsibilities.

Talking about the professionalism of your role just isn't adequate to appreciate the real influence you have in today's higher education environment. That's because the cornerstone of what it means to be "professional" is essentially specialization. In our professional lives we increasingly call ourselves "specialists." Specialists—the imagery is of a systematic narrowing and bracketing of issues, activities, tasks and concerns that constitute the professional portfolio. Specialists specialize—and specializations are marked by a deep understanding of things that have a narrow focus. The professionalization of our work leads us to be specialists who fragment problems into pieces. But professional specialists aren't sufficient when the major challenges we face are increasingly systemic and need to be understood in their wholeness and interrelatedness.

There's an important role for aid professionals marked by a deep level of specialization in one component of our higher education industry—I don't belittle that. I just think that we do a disservice to the leadership role of today's financial aid officer if we start defining it solely in terms of its professional roles and responsibilities.

Your Role Is Not Defined By Your Processes

So, if it's not the position and it's not the profession that describes the role of today's financial aid officer, what is it? What I often hear financial aid officers say is that their role is to orchestrate, integrate and coordinate a whole constellation of complex processes upon which rests not only the success of our individual institutions but of the entirety of our social contract and societal obligations for access and attainment. Perhaps it's not so much a position nor a profession but rather a process that defines your role and establishes the centrality of what you do.

There is no doubt that the role of the financial aid officer is to orchestrate a critical and complex set of processes. You manage a level of complexity that most of your colleagues at your institutions cannot possibly fathom. In fact, I recently completed a comprehensive flowchart of processes in financial aid as well as other business processes at my university and I determined that there is only one administrative process at DePaul that is more complex, more complicated, than financial aid—the process required to get reimbursement for a \$5 taxi cab expense without a receipt.

The financial aid process is indeed a critical responsibility you bear; there may in fact be no other administrative process that is more critical, that is more intricate in terms of compliance and consequence, volume and individuality, cold analytics and deep personal emotion, than the processes you manage and master.

I'd suggest, though, that you also do yourselves a disservice in appraising your role solely in terms of orchestrating a process. Regardless of its complexity or how "mission critical" a process is, from an institutional perspective, any process is only as valuable as it provides a sustainable strategic advantage.

And a process is only as strategically valuable as it provides the opportunity for organizational learning. Mismanaging the financial aid process can be a disaster; managing it extremely well can be a real asset. But the real strategic value of the process of financial aid and your role in managing it rests in *how much we're able to leverage that process as an opportunity for institutional learning*—and then using that learning to create a strategic advantage.

Let me give an example from DePaul. We are knee-deep in managing a process by which students appeal their financial aid award, where students come to the financial aid office with the need to review and perhaps revise their aid award because of unanticipated changes in their financial circumstances. That's a critical process. We won't hit our enrollment targets without it; students won't realize their educational aspirations without it; and

families won't be able to sustain their support for their students' enrollment at DePaul without it. So yes, it's important.

However, if our role never surpasses the effective management of this process, if our role is entirely defined by coordinating the processes we oversee, if success is measured by the efficiency and the effectiveness of the process itself, then I suspect that we've missed something very important. The appeal process is only strategically valuable to us if it enables us to learn. It must be a process by which we better assess, evaluate and analyze the changing nature of affordability and the changing dynamics of our market and DePaul's relative perceived value in that market. Then we need to use that knowledge to leverage a greater university understanding and dialogue that transcends the appeal process itself; that's broader than the entire financial aid policy arena.

The most critical strategic advantage for these times comes solely from the relative capability of members of an organization to learn from the information their daily work brings to their attention and to apply that knowledge to create a strategic advantage. The only advantage is in the learning process—not the management process.

The insights provided by the work of scholars like Peter Senge is this: organizations that will truly excel in the future will be the organizations that discover how to tap people's commitment and capacity to learn at all levels in an organization. To a large degree, it starts with ensuring that the roles of our financial aid officers are understood in terms of the learning they enable, not the processes they manage.

So what Paula's had to do at DePaul is design an appeal process not just to ensure its effective management, its compliance and its consistency—but to also ensure that it can be leveraged for learning in the long run. And it's in viewing our role in helping the organization to learn that we begin to get a deeper understanding of and appreciation for the essential, strategic role of the financial aid administrator in today's colleges and universities.

Your Role Is Not Defined By Problem Solving

Fourth, I see the same challenge when I hear managers—including financial aid officers—describe their role as problem-solver. Many managers in fact fully equate their management role with problem solving. They define their role that way. For many of you I am sure that it seems as if problem solving is the basic metabolism of your organizations.

What do I mean by that? Every organism has a metabolism—it's how the organism generates its energy and how it expends its energy. So too with organizations. Each of our organizations has a metabolism of its own: the particular ways that it generates energy in the workplace and ways that it expends its energies. Think about it—what are the things that energize your organization, that generate energy and consume energy? For many organizations, it's the ongoing process of overcoming friction and fragmentation between and among our many silos and administrative bailiwicks; dealing with friction and fragmentation generates and consumes our collective energy and it unfortunately defines the metabolism of many organizations. For others, energy is generated and consumed in competing for scarce resources; for others, it's reacting to crises.

In my experience, and as Peter Senge has noted, the basic metabolism of most management teams tends to be resolving problems. In fact, sometimes our greatest sense of a job well done and a day well spent and a salary well earned is the identification of a problem and its successful resolution.

Of course, our workdays are full of problems and their resolutions. And trust me, as a senior enrollment officer at DePaul, one of the things I value most in Paula and her staff is their capacity to effectively solve problems.

But when we accept the notion of problem-solving as our definition of our roles and responsibilities, we again marginalize that role and doom it to be something other than at the core of our strategic value to the broader enterprise.

Here's one reason why a problem-solving mindset isn't sufficient to elevate our role and understand our real opportunities for influence in our organizations. You know what most of today's problems are? Typically, today's problems are yesterday's solutions. Perhaps the most interesting insight from Peter Senge's work is this: most of the problems we are grappling with today are the direct consequence of the solutions we created yesterday to the prior day's problems.

One of the best examples is something you deal with every day. It is one of the prevailing problems in the world of financial aid in America—the complexity of the FAFSA. But it didn't just become what it is overnight, did it? It has evolved in its current complexity as a solution to multiple problems that had to be solved somehow. In today's FAFSA, we find a great example of how yesterday's solutions are now today's problems.

Another example is the concept of financial aid as a discount. For years, chief university financial officers viewed financial aid as an expense line in our institutional budgets; and as an expense line, the goal is always to minimize expenditures—and to cease those expenditures once the budget's exhausted. Financial reporting standards used to require that institutionally budgeted financial aid appear on financial statements as expense items, thereby concretizing for CFOs and Board members a perspective that defined a financial aid budget as a limited resource to be managed independently of a net revenue outcome.

About 20 years ago, a few of us were developing and introducing analytical models which were intended to reframe what was the traditional way of thinking of how financial aid is used to achieve enrollment goals. We were bringing to the institutional policy arena and to budget officers an understanding that aid is not an expense to be minimized, but a “discount” to be optimized; that we should see it as a discount above the line of our budget ledgers not an expense below the line. By viewing it that way, we would see that the goal is to optimize net revenue, not limit expenditures.

The intent was to show how viewing institutional financial aid as a discount off of tuition price brings into sharp relief numerous strategic and market dynamics that shape enrollment outcomes. This view identifies opportunities for effectively managing enrollment and revenue outcomes through offering differential net prices to certain students or groups of students. The goal, in other words, was to reframe financial aid as a strategic tool to be leveraged in balancing multiple institutional goals.

In a fascinating example of how prevailing mental models are transformed, a breakthrough came when National Association of College and University Business Officers (NACUBO) changed its reporting standards to have budgeted institutional aid appear in university financial statements as discounts off tuition revenue “above the line” instead of as an expense itemized “below the line.” With that change in financial reporting standards, the perspective at most campuses was completely reoriented, and the frequency of financial aid being defined, described and accepted as a tuition discount managed in light of net tuition revenue exploded overnight.

Well, we'd thought we'd solved the problem—and we had—but that solution became our new problem because the discount terminology took over our entire enterprise.

What is actually just a statistical ratio used to understand budgeted aid relative to revenue has now become a management objective in its own right. As all institutionally budgeted financial aid has come to be calculated and reported as a tuition discount and the most common measure of an institution's commitment to financial aid is now summed up in that institution's “discount rate,” we've introduced an overly simplistic parsimony to the strategic dialogue. As this measure of discount has entered the lexicon and mental model of Board members, presidents, faculty, CFOs and budget committees, it has taken on a life of its own, independent of the nuance and context that budgeted financial aid requires. It is not uncommon to find Boards and executives putting boundaries on a discount rate, setting goals for reducing a discount rate, or just raising concerns about discounting and the discount rate in ways completely independent of other outcome measures. In addition, the media and other critics of higher education have taken discounting as a shorthand way of painting our aid strategies in the most negative light. The enrollment management and financial aid leadership now face a persistent challenge in helping others understand that the *discount rate* is not as meaningful or consequential an outcome as the net revenue realized.

These two examples illustrate clearly Senge's principal of how today's problems are just yesterday's solutions. When you think about it, what's the corollary of that principal? If today's problems are yesterday's solutions, then what are today's solutions? They are tomorrow's problems.

This is why a problem-solving mindset for how we define our roles and responsibilities is never a fully adequate approach to appreciating the strategic nature of your role. It may be the way your time and energy is consumed; it may be the dominant metabolism of your organization; but there's something about problem solving that fails to crystallize and clarify the strategic value of your role.

Your Role: Reframing

Instead, I'd argue that the crucial role you have in your organization is not to solve problems but to create them, to surface them, to define them, to frame them. The unique role that the financial aid officer has in today's university setting is to unearth, surface and challenge the many taken-for-granted assumptions that permeate the collective mindset. In short, to get beyond the endless cycle of problem solving and hit the reset button.

Let me give an example. DePaul, like most of your institutions, has a concern about the rates of retention and graduation of its undergraduates. There's a general sense that completion rates are not as high as they should be. There's also a sense that family finances are a dominant factor in our retention equation, that excessive need and a growing "gap" are primary determinants of attrition.

The only thing that's more striking than this collective campus-wide insistence that cost is at the root of the retention problem and aid is therefore the root of the retention solution is the utter lack of any empirical evidence that this assumption is in fact true! There's anecdotal evidence that this is true, typically perpetrated by staff in various student service units who have known students who dropped out because they couldn't afford it, leading to the generalized conclusion that this must be the primary driver of attrition. Moreover, they assume that those most likely to leave due to cost constraints are surely the lowest income students. The common wisdom argues if only we managed our financial aid processes differently, we'd be able to avoid that outcome.

Now if our role was problem solving, we would be looking for ways to remedy attrition using financial aid solutions.

But at DePaul, our job may be to solve problems but we don't see our *role* as problem solving—our role is problem *framing*. So we've been actively bringing to the campus community and university leadership some novel and fascinating data analysis that shows how our low-income students have extremely high retention and graduation rates. In addition, we found that any systemic use of financial aid as an instrument to improve graduation rates through a comprehensive approach to "closing the gap" would have negligible—even negative—return on investment, and that the primary reason students may run out of financial assistance is their failure to make *satisfactory academic progress*.

Sure we could mount a financial aid response to attrition, but the root of the problem is one of academic progress more than affordability. By using our analysis to explore this issue, to define the problem, and to reframe it and challenge the often unquestioned assumptions that underlie the campus dialogue, we have reoriented the institution's thinking, surfaced a whole new set of insights and observations, and focused attention on something at the center ring of the institutional circus: students' academic performance and progress!

Our role was to frame and reframe the problem—not solve it. Framing is the intentional process by which we define the context for any decision, discussion or debate, and I suggest to you that it is the most powerful way of exercising influence. The key to real institutional leadership is identifying those assumptions and beliefs that frame the policy arena, those mental models that determine how our organizations define problems and thereby how they envision solutions, and then reframing those mental models in order to effect change.

That's very different than problem solving, I assure you. It's about learning.

Here's another DePaul example. A year ago a delegation of faculty from the sciences came to visit. Their concern was this: many freshman pursuing majors in the sciences required remedial levels of mathematics before they could begin the science sequence of courses, which immediately put them off track from timely degree completion. The faculty knew that if they could get students to do some of this remedial-level work in the summer—before the first fall term—a substantial share of students, especially some of our students from Chicago Public Schools, could start on the right track. That's a laudable goal, to be sure. Since financial aid wasn't applicable to the summer term, financial aid was seen as the primary impediment to students effectively using the summer to ramp up.

So they came to petition us to allow institutionally budgeted aid to apply to summer courses. Of course, I denied their request—but not for the reasons they expected.

You see, financial aid was neither the problem nor was it the solution. The problem was that as a university we had decided that the way to deliver remedial-level math courses to prepare students for college-level math was to do so in traditional courses, taught by our faculty and charged our undergraduate tuition—which is so high it requires financial aid to help students afford it.

My solution was this: let's reframe this entire situation from one where we have to provide aid to cover high tuition and instead deliver remedial-level instruction without charging any tuition at all. Let's just cover the instructor's salary by hiring teachers off load, and offer these courses free of charge for any student requiring them; it's cheaper to pay an instructor for a free course than to fund the financial aid to offset the traditional tuition structure.

It wasn't a problem solved—it was a problem reframed, a problem redefined; assumptions surfaced and assumptions challenged. We hit the reset button and instead of continuing in a problem solving cycle, we set out to reframe the entire approach.

To lead our institutions, the focus of our efforts must be on the mental models—the deeply ingrained assumptions and generalizations that influence how we understand the world and how we take action. It's common to assume that most people believe you change and lead organizations by rearranging external conditions, things like organizational structures, reward systems or new technologies. But, as Senge has taught us, organizations are the way they are because of *how people think*. Effective leadership and influence starts and stops with shaping the mental models and assumptions that dictate why and how we do things the way we do them.

Moving organizations forward requires more than a compelling vision of the future; much of the leverage leaders can actually exert in changing organizations lies in helping people achieve more accurate, more insightful and more empowering views of reality by reframing common understandings and unquestioned assumptions. That's another lesson directly from Peter Senge. I repeat: much of the leverage leaders can actually exert lies in helping people achieve more accurate, more insightful and more empowering views of reality.

And therein lies the powerful opportunity and obligation for today's financial aid officer: to frame and reframe the institutional dialogue in meaningful ways. Your role is to help the organization learn—to challenge the prevailing assumptions and mental models that frame the way leaders think and act, and to leverage change by enabling a more informed, insightful and empowering view of reality.

I know what you're thinking: "so what's his point?" I know you are asking yourselves that question because that's what everyone wonders after listening to me for about 30 minutes.

What's my point? That your understanding of what it means to be a financial aid officer will be top of mind as you kick off this conference tonight, as you participate in it with your professional colleagues over the next two days, and as you head back to your campuses at its conclusion. As you are reflecting on your roles and responsibilities, it would be unfortunate if you thought only in terms of your position or your profession or the processes you coordinate or the problems you must solve.

I think your role is far more important, more influential and more powerful than that. In fact, I think your role potentially exerts more influence on our organizations than any other role on campus. You are potentially the most powerful, influential group on campus though it may not seem the case on organizational charts and in terms of status and hierarchy.

Boundary Spanning

I recall the insights of Dr. Bob Silverman, professor of higher education at Ohio State University, as he reflected 25 years ago on the fact that certain professional groups in higher education were constantly grappling and groping with issues about how they could be more appreciated, more valued, more readily recognized as being at the core of the university enterprise. Bob wrote a very provocative essay about the value that comes from not being at the core of a large enterprise, but instead from being on its periphery.

Real influence, he argued, comes not from being at the core of what we are all about in higher education but rather from staking out a position on the organizational boundary. When you are on the boundary of an organization, your task is to communicate and articulate to the external environment the internal values and purposes and priorities of what that organization is all about. Of course, that's what you do every day: you communicate and articulate the internal values, purposes and priorities of what your institution is all about to many external audiences. Simultaneously, only on the boundary can you scan that external environment and bring intelligence and perspective and information back to the core functions of the institution. Of course, you also do that every day: you gather insight, information and intelligence from what's going on external to your institution and you bring that intelligence and perspective and information back to the core functions. You have a foot inside and a foot outside the organization. You're living on the edge. And the boundary of an organization is the most exciting place to be.

In our industry of higher education, what's at the core? The faculty are and will always be at the core of a university; and their primary activity is what higher education is all about, namely the functions of teaching, learning and research. However, what I've learned over the years is that this core activity is not where real influence lies in an organization. Greater influence comes from being on the periphery, on the boundary. Enrollment management—and financial aid—by definition and in practice, is a classic example of a boundary-spanning activity. How we exert influence is precisely by not being at the core with all the trappings and symbols of power and influence, but instead by being out on the edges of the organization, straddling the internal and external environments, striving to effectively translate one reality to the other. That's your role—and that's your responsibility.

The Financial Aid Officer as Scout

So let me leave you with the following imagery that I hope illustrates my view of your role in your institutions.

There's a story I once encountered told by David Berlo, president of Illinois State University in the 1970s, who likened his campus to that of a cavalry regiment on the frontier in the old movie Westerns. He said that as a child he used to watch the classic westerns and admire the colonel of the cavalry; the colonel was the one who had all the power and authority at the fort and all the trappings of that authority. He had the nicest house, the sharpest uniform, the best looking horse, and most importantly he got to tell everyone what to do. He was in charge—and that's who any young person watching those movies would want to grow up to be.

Berlo chose university administration instead of a military career—and eventually earned the role he aspired for—namely, a university presidency. And with it came all the trappings of power and authority—the nicest house, the coolest robes at commencement, and of course the ability to tell everyone what to do.

But in his experience, as Berlo recounts this story, he found that most days he really didn't seem to be in charge of much, didn't seem to be able to make things happen and wasn't able to influence the organization as he'd like. Perhaps he had missed some leadership technique that worked well for the colonel back on the frontier. So he went back and rewatched those movies to see what he'd perhaps overlooked as a leadership technique.

Upon a second look, he noted something that he'd missed as a child. He saw that real power at the fort didn't rest with the colonel after all. The one really in control wasn't the one who had all the trappings of power, or who had the fullest breadth of command and who held a clear position of authority. No, real power and real influence in the old Westerns rested with one person who had no obvious authority at all, no apparent base of power and who wasn't even part of the formal line of command. He had no house, no uniform and couldn't really order anyone to do anything. But make no mistake about it—he was in control. Who was it?

It was the scout. It was the scout who had none of the authority but all of the influence. The scout was the one person who knew the terrain, who knew the enemy, who by living at the fringe of the organization had all the critical information and thereby had the most sweeping influence in determining the ultimate success of the enterprise. The scout lived on the boundary of the frontier cavalry—one foot in and one foot out. How he viewed the external environment, how he interpreted it, how he made sense of it and to what degree he chose to share his insights with those in charge—that was real influence. That was leadership. Formally, the scout was in command of nothing, but those who were in formal command ignored the scout's information only at their own peril. So the astute colonel accepted all the authority and all the accountability, but was never naive enough believe he was actually in control of the situation. That role and that responsibility was the scout's.

My friends and colleagues, the role of the financial aid officer is higher education's equivalent of scouting, pure and simple. It's not your position, your profession, your processes or problem-solving. Your role is all about being attuned to external market realities, about understanding students and parents and legislators and employers. It's about translating to those audiences our internal and often arcane academic vernacular and idiosyncratic jargon and core mission. It's also about bringing to those at the core of the organization and those with the authority—be they the faculty or the executive leadership—valuable intelligence and insight about the competition and about the customer, about market dynamics and demographic futures, about looming threats and new opportunities—either far off on the horizon or right around the bend. You read those signals, you frame the challenges and opportunities, you take that information and expertise you have and share it in ways that effectively teaches and guides the organization toward its chosen goals and objectives. You help the organization learn, and use those learnings to create strategic advantage. That's your role and your responsibility. Therein lies your real influence and real value.

And that's also what makes it so much fun.

Thank you for your kind attention. Enjoy your conference. Best wishes as you return to your campuses. And buckle in for a ride this year that will be like nothing we've ever seen before. Above all—happy scouting.

Referenced within this speech is Peter Senge's *The Fifth Discipline: The Art & Practice of The Learning Organization*, New York: Currency Doubleday, 1990.