

Communicating Up

Ensuring the Voice of the Financial Aid Office is Heard in the President's Office

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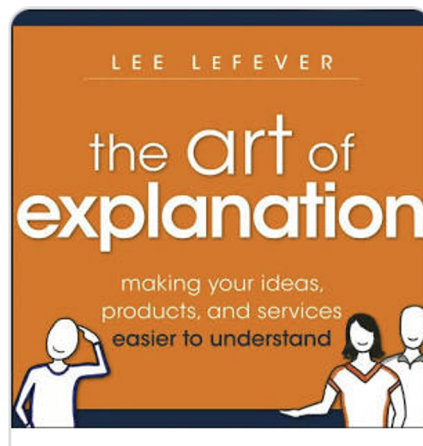
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In what contexts do we find ourselves misunderstood or unheard by college presidents?

Put another way, what concepts do we find ourselves explaining over and over again?

What information do we need our college presidents to have?

3



4

Traits of Great Communicators?

5

Empathy

So, let's put ourselves in the shoes of a college president. Tell me about the role of a college president.

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The Curse of Knowledge



1. Where you are
2. Where your audience is
3. *****Where you need your audience to be*****

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What is an explanation?

An explanation is a set of statements constructed to describe a set of facts which clarifies the causes, context and consequences of those facts.

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What Gets in the Way of a Great Explanation?



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Packaging a Great Explanation

Context (WHY)

- Agreement
- Stories and Connections
- Identifying a common pain point
- Metaphors and analogies



Facts and Descriptions (WHAT)

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Packaging a Great Explanation Continued

3. Consequences

- Reinforcing the why, again
- Reign in the hyperbole
- Talk the language of ***risk management and assessment***

4. Call to Action

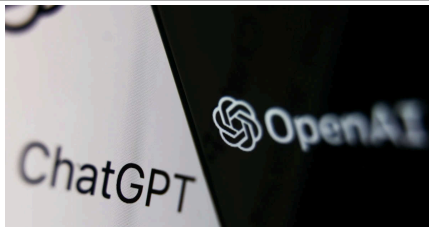
- What do they do with that information?

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Written Communications & People

1. Say more by saying less
 - a. Subjects, headings, and bullets in emails (don't waste time!)
 - b. AI can help you here
 - c. Slides & graphs tell the story
2. Who are the people around the president who can make your case, carry your water?
 - a. Chief of Staff, Executive Assistants, Vice Presidents?

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Input

I'm a financial aid director at a postsecondary institution and I'm sending the following email to the president of my institution asking for more money for an entirely new financial aid management system. Please condense this email down to 100 words with a subject headings and bullets.

Dear President -

Over the last many years, our office has struggled to keep pace with the increasing rate of regulations and changes from both the federal government and the state government. While we have had no findings in our annual audits, we have staff that are continually working overtime to make up for deficiencies in our financial aid management software system. This system is antiquated and we do not receive the level of support that we were promised when we originally purchased and licensed it over 10 years ago. The time has long come for us to consider other options. This will no doubt be a massive undertaking, but the alternative is worse: staff burnout, high turnover, noncompliance with federal and state laws, potential fines and the stress of knowing that we may be out of compliance and failing to live up to the standards we care so deeply about.

Output

Subject: **Urgent Need: Updated Financial Aid Management System**

Dear President,

- **Rising Regulatory Pressure:** Continuous changes in federal and state regulations challenge our current system.
- **Staff Overwork:** Due to software inefficiencies, staff are frequently working overtime.
- **Outdated System:** Our decade-old software lacks promised support.
- **Potential Consequences:** Without change, we risk staff burnout, high turnover, legal noncompliance, potential fines, and institutional reputation.

It's crucial we invest in a modern system to maintain compliance and staff well-being.

Best regards,
[Your Name]

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Input

Can you come up with an opening sentence that will grab our president's attention?

Output

Subject: **Urgent Need: Updated Financial Aid Management System**

"President [Name], our financial aid system's inefficiencies are dangerously close to jeopardizing our institution's reputation and compliance."

Dear President,

- **Rising Regulatory Pressure:** Continuous changes in federal and state regulations challenge our current system.
- **Staff Overwork:** Due to software inefficiencies, staff are frequently working overtime.
- **Outdated System:** Our decade-old software lacks promised support.
- **Potential Consequences:** Without change, we risk staff burnout, high turnover, legal noncompliance, potential fines, and institutional reputation.

It's crucial we invest in a modern system to maintain compliance and staff well-being.

Best regards,
[Your Name]

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Final Edited Version

Subject: **Urgent Need: Updated Financial Aid Management System**

Dear President [Last Name]

Our outdated financial aid system's inefficiencies are dangerously close to jeopardizing our institution's reputation, service to students, and federal compliance.

The Ask: I'm seeking permission to begin the procurement process to go out to bid for a new financial aid management software provider.

Context and Reasoning:

- **Rising Regulatory Pressure:** Continuous changes in federal and state regulations challenge our current system.
- **Staff Overwork:** Due to software inefficiencies, staff are frequently working overtime.
- **Outdated System:** Our decade-old software lacks promised support.

Potential Consequences: Without change, we risk staff burnout, high employee turnover, legal noncompliance, potential fines, and loss institutional reputation. I rate these risks as moderate to high.

I've attached 10-slides that provide an overview of our current financial aid operations and volume that depend on our FAM system, and the pain points where it is currently failing. I'm available if you would like to discuss further.

Best regards,
[Your Name]

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