**Job Function:** Faculty and Student Services  
**Job Family:** Financial Aid - Professional

**Job Family Summary:** Perform or manage the financial aid award process in accordance with federal, state, and university regulations, policies, and procedures in order to foster a diverse, inclusive and innovative community.

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</table>

**Job Summary**

- Independently review financial information submitted by applicants to determine eligibility for financial assistance. Determine type and amount of aid to be awarded in accordance with established federal and university standards and guidelines.
- Independently perform a variety of financial aid activities including reviewing and evaluating financial information submitted by applicants to determine aid award in accordance with established federal and university standards and guidelines.
- Independently perform financial aid activities including evaluating and analyzing financial information submitted by applicants, counseling students on debt management, financial aid reporting and analysis in accordance with established federal and university standards and guidelines.

**Core Duties**

- Review financial information submitted by applicants and ensure that all requirements are complete
- Process and disseminate financial offers to admitted applicants
- Determine and prepare financial aid awards and set up authorizations for student tuition and stipend awards
- Counsel prospective and current students, and families, regarding financial planning and financial assistance
- Organize events including orientation programs and receptions
- Apply financial aid policies; respond to inquiries and information requests
- Ensure compliance with federal, state and institutional financial aid requirements and auditing standards
- Evaluate and analyze financial information submitted by applicants, ensuring data is accurate and compliant, and process awards
- Conduct needs analysis and prepare financial aid awards for students, review appeals for applicants requesting additional financial assistance
- Counsel prospective and current students, and families, on financial planning and financial assistance
- Responsible for event preparation and presentations such as entrance and exit counseling sessions, budgeting and debt workshops, admissions open houses, student orientation
- Prepare analysis and projection of financial aid funds
- Collaborate on the development and editing of publications, financial aid forms, general student correspondence, website content
- Interpret and administer admissions and financial aid policies for applicants and staff
- Ensure compliance with federal, state and institutional financial aid requirements and auditing standards
- Evaluate and analyze financial information submitted by applicants, ensuring data is accurate and compliant, and process awards
- Conduct needs analysis and prepare financial aid awards for students, review appeals for applicants requesting additional financial assistance
- Counsel prospective and current students, and families, on financial planning and financial assistance
- Assist in planning and implementing financial aid strategy to attract applicants
- Develop and analyze detailed statistical documents including budget sheets and yield reports; provide reports to management to assist with setting the strategic direction of the financial aid function
- Develop and evaluate financial aid materials, website content, forms, etc.
- Interpret and administer admissions and financial aid policies for applicants and staff; assist management with policy development
- Ensure compliance with federal, state and institutional financial aid requirements and auditing standards
# Job Family Matrix

<table>
<thead>
<tr>
<th>Basic Qualifications</th>
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</tr>
</thead>
<tbody>
<tr>
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</tr>
<tr>
<td>• Minimum of 1 year relevant work experience</td>
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</table>

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<tr>
<th>Additional Qualifications and Skills</th>
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<td>• Knowledge of Microsoft Office Suite, advanced Excel skills</td>
</tr>
<tr>
<td>• Working knowledge of basic financial aid administration processes</td>
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<td>• Advanced knowledge of financial aid administration processes</td>
</tr>
<tr>
<td>• Excellent written and oral communication skills</td>
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<tr>
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<tr>
<td><strong>Grade Level:</strong> 58</td>
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<tr>
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<tr>
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<tbody>
<tr>
<td>Facilitate financial aid activities, serve as a subject matter expert, and provide analysis and reporting for the department in accordance with university and departmental policies.</td>
<td>Lead financial aid activities such as aid analysis and evaluation, debt counseling, and financial aid reporting in accordance with university and departmental policies.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Core Duties</th>
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</tr>
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<tbody>
<tr>
<td>- Evaluate and analyze financial information submitted by applicants, ensuring data is accurate and compliant, and process awards</td>
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</tr>
<tr>
<td>- Function as subject matter expert or project lead</td>
<td>- Function as subject matter expert or project lead</td>
</tr>
<tr>
<td>- Conduct needs analysis and prepare financial aid awards for students, review appeals for applicants requesting additional financial assistance</td>
<td>- Conduct needs analysis and prepare financial aid awards for students, review appeals for applicants requesting additional financial assistance</td>
</tr>
<tr>
<td>- Counsel prospective and current students, and families, on financial planning and financial assistance; develop and lead information and recruitment sessions</td>
<td>- Counsel prospective and current students, and families, on financial planning and financial assistance; develop and lead information and recruitment sessions</td>
</tr>
<tr>
<td>- Collaborate with management to develop strategic goals for financial aid</td>
<td>- Advise management on strategic goals for financial aid</td>
</tr>
<tr>
<td>- Develop specialized financial aid reports to track awards, trends, etc.; analyze data and make recommendations for use in strategic planning</td>
<td>- Ensure accurate and timely admissions reporting and analysis for use in strategic planning; develop specialized and ad hoc reports to track trends, yields and metrics</td>
</tr>
<tr>
<td>- May provide coaching and staff training</td>
<td>- May provide coaching and staff training</td>
</tr>
<tr>
<td>- Develop and evaluate financial aid materials and procedures for communicating critical aid processes, awards, and debt information to students</td>
<td>- Develop communications strategies, procedures and materials for communicating critical aid processes, awards and debt information to students</td>
</tr>
<tr>
<td>- Assist senior management in formulating financial aid policies and procedures; make recommendations to improve overall administration</td>
<td>- Identify areas for efficiency or improvement within existing policies and procedures; recommend improvements</td>
</tr>
<tr>
<td>- Ensure compliance with federal, state and institutional financial aid requirements and auditing standards</td>
<td>- Ensure compliance with federal, state and institutional financial aid requirements and auditing standards</td>
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</table>
### Basic Qualifications
- Bachelor’s degree or equivalent work experience required
- Minimum of 7 years’ relevant work experience
- Bachelor’s degree or equivalent work experience required
- Minimum of 8 years’ relevant work experience

### Additional Qualifications and Skills
- Master’s degree in relevant field preferred
- Knowledge of Microsoft Office Suite, advanced Excel skills
- Advanced knowledge of financial aid processes
- Communication skills (both written and verbal), including specifically: the ability to make presentations to large groups of students, parents and alumni
- Master’s degree in relevant field preferred
- Knowledge of Microsoft Office Suite, advanced Excel skills
- Advanced knowledge of financial aid processes
- Communication skills (both written and verbal), including specifically: the ability to make presentations to large groups of students, parents and alumni

### Certificates and Licenses

### Physical Requirements
- Sitting, near vision use for reading and computer use for extended periods of time
- Lifting (approximately 20 to 30 pounds), bending, and other physical exertion
- Sitting, near vision use for reading and computer use for extended periods of time
- Lifting (approximately 20 to 30 pounds), bending, and other physical exertion

### Working Conditions
- Work is performed in an office setting
- Travel may be required
- May be required to work nights and weekends
- Work is performed in an office setting
- Travel may be required
- May be required to work nights and weekends
### Job Family Matrix

**Job Function:** Faculty and Student Services  
**Job Family:** Financial Aid - Management

**Job Family Summary:** Perform or manage the financial aid award process in accordance with federal, state, and university regulations, policies, and procedures in order to foster a diverse, inclusive and innovative community.

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</tr>
<tr>
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**Job Summary**

- **Job Title:** FSS Financial Aid Mgt I  
  - **Job Code:** S0155M  
  - **Grade Level:** 55  
  - **Exemption:** Exempt  
  - **Effective/Revision Date:** December 2018  
  - **Core Duties:**
    - Supervise financial aid activities in accordance with established federal and university standards and guidelines.

- **Job Title:** FSS Financial Aid Mgt II  
  - **Job Code:** S0156M  
  - **Grade Level:** 56  
  - **Exemption:** Exempt  
  - **Effective/Revision Date:** December 2018  
  - **Core Duties:**
    - Supervise the day-to-day financial aid activities including reviewing and evaluating financial information submitted by applicants to determine aid award in accordance with established federal and university standards and guidelines.

- **Job Title:** FSS Financial Aid Mgt III  
  - **Job Code:** S0157M  
  - **Grade Level:** 57  
  - **Exemption:** Exempt  
  - **Effective/Revision Date:** December 2018  
  - **Core Duties:**
    - Manage financial aid operations including evaluating and analyzing financial information submitted by applicants, counseling students on debt management, financial aid reporting and analysis in accordance with established federal and university standards and guidelines.

**Core Duties**

- Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment
- Supervise financial aid award process including application processing, award determination and dissemination and applicant advising
- Plan and administer financial aid events and counseling sessions
- May plan and manage departmental budget
- Prepare and analyze financial aid reports to track trends
- Monitor technology systems and provide training
- Assist in developing departmental policies and procedures, recommend improvements
- Ensure compliance with federal, state and institutional financial aid requirements and auditing standards

- Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment
- Manage financial aid operations including application processing, award determination
- Counsel prospective and current students, and families, on financial planning and financial assistance
- Develop and plan financial aid information sessions and events
- Participate in financial aid strategy development to meet the needs of students
- May plan and manage departmental budget
- Prepare and analyze financial aid reports to track trends
- Manage technology systems and provide training
- Assist in developing departmental policies and procedures, recommend improvements
- Ensure compliance with federal, state and institutional financial aid requirements and auditing standards

- Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment
- Oversee financial aid operations including application processing, needs evaluation, applicant advising and event planning
- Counsel prospective and current students, and families, on financial planning and financial assistance
- Contribute to financial aid strategy development to meet the needs of students
- May plan and manage departmental budget
- Prepare and analyze financial aid reports to track trends
- Provide training on relevant regulations, new technology, or new procedures
- Evaluate departmental policies and procedures and recommend improvements
- Ensure compliance with federal, state and institutional financial aid requirements and auditing standards
### Basic Qualifications
- Bachelor's degree or equivalent work experience required
- Minimum of 1 years relevant work experience

- Bachelor's degree or equivalent work experience required
- Minimum of 3 years' relevant work experience

- Bachelor's degree or equivalent work experience required
- Minimum of 5 years' relevant work experience

### Additional Qualifications and Skills
- Supervisory experience
- Knowledge of Microsoft Office Suite, intermediate Excel skills
- Working knowledge of financial aid processes
- Communication skills (both written and verbal)

- Supervisory experience
- Knowledge of Microsoft Office Suite, intermediate Excel skills
- Working knowledge of financial aid processes
- Communication skills (both written and verbal)

- Supervisory experience
- Master’s degree in relevant field preferred
- Knowledge of Microsoft Office Suite, advanced Excel skills
- Advanced knowledge of financial aid processes
- Communication skills (both written and verbal)

### Certificates and Licenses

### Physical Requirements
- Sitting using near vision use for reading and computer use for extended periods of time
- Lifting (approximately 20 to 30 pounds), bending, and other physical exertion

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### Working Conditions
- Work is performed in an office setting
- Travel may be required
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<td>Lead financial aid operations and oversee compliance to ensure that all processes are in accordance with established federal and university standards and guidelines.</td>
<td>Oversee all aspects of financial aid administration including compliance, disbursement of funds, and financial aid reporting in accordance with established federal and university standards and guidelines.</td>
<td>Provide strategic direction, leadership and guidance. Oversee all aspects of the financial aid process including comprehensive program design and delivery, compliance, operations and communications.</td>
</tr>
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<th>Core Duties</th>
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<td>• Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</td>
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</tr>
<tr>
<td>• Lead the development and implementation of a comprehensive financial aid program designed to address the needs of students including award evaluation, applicant advising and event planning</td>
<td>• In partnership with senior leadership, develop and implement effective, long range financial aid plans; oversee disbursement of funds and direct and implement strategic awards to maintain or increase enrollment yields</td>
<td>• Determine strategic direction of department by establishing goals and implementing new financial aid initiatives</td>
</tr>
<tr>
<td>• Lead financial audits to ensure program compliance with federal and institutional regulations; make corrections as necessary</td>
<td>• Direct the audit review process to ensure program compliance with federal and institutional regulations</td>
<td>• Direct all aspects of the financial aid function including application processing, needs evaluation, award determination and financial aid advising</td>
</tr>
<tr>
<td>• May plan and manage departmental budget</td>
<td>• May plan and manage departmental budget</td>
<td>• Develop and implement a strategic financial aid plan to meet the needs of students and ensure a diverse community</td>
</tr>
<tr>
<td>• Design and create complex reports to support financial aid goals; analyze financial aid metrics to support strategic planning</td>
<td>• Develop financial aid reports, analyze data and trends to refine procedures, policies and practice</td>
<td>• Develop and implement a strategic financial aid plan to meet the needs of students and ensure a diverse community</td>
</tr>
<tr>
<td>• Manage financial information systems and advise on future technology strategy and needs</td>
<td>• Monitor technologies, systems and business processes; develop, enhance and implement processes</td>
<td>• Develop, implement and provide interpretation of admissions policies and procedures</td>
</tr>
<tr>
<td>• Assist in formulating financial aid policies and procedures; advise department managers and staff on financial aid policies</td>
<td>• Collaborate with leadership to continuously improve financial aid policies</td>
<td>• Develop, implement and provide interpretation of admissions policies and procedures</td>
</tr>
<tr>
<td>• Ensure compliance with federal, state and institutional financial aid requirements and auditing standards</td>
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| • Ensure compliance with federal, state and institutional financial aid requirements and auditing standards | | }
# Basic Qualifications
- Bachelor's degree or equivalent work experience required
- A minimum of 7 years' relevant work experience

# Basic Qualifications (continued)
- Bachelor's degree or equivalent work experience required
- Minimum of 8 years' relevant work experience
- Supervisory experience

# Basic Qualifications (continued)
- Bachelor's degree or equivalent work experience required
- Minimum of 10 years' relevant work experience
- Supervisory experience

# Additional Qualifications and Skills
- Supervisory experience
- Master’s degree in relevant field preferred
- Knowledge of Microsoft Office Suite, advanced Excel skills
- Advanced knowledge of financial aid processes
- Communication skills (both written and verbal)

# Additional Qualifications and Skills (continued)
- Master’s degree in relevant field preferred
- Knowledge of Microsoft Office Suite, advanced Excel skills
- Advanced knowledge of financial aid processes
- Communication skills (both written and verbal)

# Additional Qualifications and Skills (continued)
- Master’s degree in relevant field preferred
- Knowledge of Microsoft Office Suite, advanced Excel skills
- Advanced knowledge of financial aid processes
- Communication skills (both written and verbal)

# Certificates and Licenses

# Certificates and Licenses (continued)

# Certificates and Licenses (continued)

# Physical Requirements
- Sitting using near vision use for reading and computer use for extended periods of time
- Lifting (approximately 20 to 30 pounds), bending, and other physical exertion

# Physical Requirements (continued)
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# Working Conditions (continued)
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