

## Job Family Matrix

<b>Job Function:</b> Faculty and Student Services		<b>Job Family:</b> Financial Aid - Professional	
<b>Job Family Summary:</b> 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.			
<b>Job Title:</b> FSS Financial Aid Officer I		<b>Job Title:</b> FSS Financial Aid Officer II	
<b>Job Code:</b> S0155P		<b>Job Code:</b> S0156P	
<b>Grade Level:</b> 55 <b>Exemption:</b> Exempt		<b>Grade Level:</b> 56 <b>Exemption:</b> Exempt	
<b>Effective/Revision Date:</b> December 2018		<b>Effective/Revision Date:</b> December 2018	
<b>Job Summary</b>		<b>Job Summary</b>	
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.	
<b>Core Duties</b>		<b>Core Duties</b>	
<ul style="list-style-type: none"> <li>• Review financial information submitted by applicants and ensure that all requirements are complete</li> <li>• Process and disseminate financial offers to admitted applicants</li> <li>• Determine and prepare financial aid awards and set up authorizations for student tuition and stipend awards</li> <li>• Counsel prospective and current students, and families, regarding financial planning and financial assistance</li> <li>• Organize events including orientation programs and receptions</li> <li>• Apply financial aid policies; respond to inquiries and information requests</li> <li>• Ensure compliance with federal, state and institutional financial aid requirements and auditing standards</li> </ul>		<ul style="list-style-type: none"> <li>• Evaluate and analyze financial information submitted by applicants, ensuring data is accurate and compliant, and process awards</li> <li>• Conduct needs analysis and prepare financial aid awards for students, review appeals for applicants requesting additional financial assistance</li> <li>• Counsel prospective and current students, and families, on financial planning and financial assistance</li> <li>• Responsible for event preparation and presentations such as entrance and exit counseling sessions, budgeting and debt workshops, admissions open houses, student orientation</li> <li>• Prepare analysis and projection of financial aid funds</li> <li>• Collaborate on the development and editing of publications, financial aid forms, general student correspondence, website content</li> <li>• Interpret and administer admissions and financial aid policies for applicants and staff</li> <li>• Ensure compliance with federal, state and institutional financial aid requirements and auditing standards</li> </ul>	
		<ul style="list-style-type: none"> <li>• Evaluate and analyze financial information submitted by applicants, ensuring data is accurate and compliant, and process awards</li> <li>• Conduct needs analysis and prepare financial aid awards for students, review appeals for applicants requesting additional financial assistance</li> <li>• Counsel prospective and current students, and families, on financial planning and financial assistance</li> <li>• Assist in planning and implementing financial aid strategy to attract applicants</li> <li>• 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</li> <li>• Develop and evaluate financial aid materials, website content, forms, etc.</li> <li>• Interpret and administer admissions and financial aid policies for applicants and staff; assist management with policy development</li> <li>• Ensure compliance with federal, state and institutional financial aid requirements and auditing standards</li> </ul>	

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Basic Qualifications	Basic Qualifications	Basic Qualifications
<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 1 year relevant work experience</li> </ul>	<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 3 years' relevant work experience</li> </ul>	<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 5 years' relevant work experience</li> </ul>
Additional Qualifications and Skills	Additional Qualifications and Skills	Additional Qualifications and Skills
<ul style="list-style-type: none"> <li>• Knowledge of Microsoft Office Suite, intermediate Excel skills</li> <li>• Working knowledge of basic financial aid administration processes</li> <li>• Excellent written and oral communication skills</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge of Microsoft Office Suite, intermediate Excel skills</li> <li>• Working knowledge of basic financial aid administration processes</li> <li>• Excellent written and oral communication skills</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge of Microsoft Office Suite, advanced Excel skills</li> <li>• Advanced knowledge of financial aid administration processes</li> <li>• Excellent written and oral communication skills</li> </ul>
Certificates and Licenses	Certificates and Licenses	Certificates and Licenses
Physical Requirements	Physical Requirements	Physical Requirements
<ul style="list-style-type: none"> <li>• Sitting using near vision use for reading and computer use for extended periods of time</li> <li>• Lifting (approximately 20 to 30 pounds), bending, and other physical exertion</li> </ul>	<ul style="list-style-type: none"> <li>• Sitting using near vision use for reading and computer use for extended periods of time</li> <li>• Lifting (approximately 20 to 30 pounds), bending, and other physical exertion</li> </ul>	<ul style="list-style-type: none"> <li>• Sitting using near vision use for reading and computer use for extended periods of time</li> <li>• Lifting (approximately 20 to 30 pounds), bending, and other physical exertion</li> </ul>
Working Conditions	Working Conditions	Working Conditions
<ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> <li>• Travel may be required</li> <li>• May be required to work nights and weekends</li> </ul>	<ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> <li>• Travel may be required</li> <li>• May be required to work nights and weekends</li> </ul>	<ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> <li>• Travel may be required</li> <li>• May be required to work nights and weekends</li> </ul>

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<b>Job Family Summary:</b> 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.	
<b>Job Title:</b> FSS Financial Aid Officer IV	<b>Job Title:</b> FSS Financial Aid Officer V
<b>Job Code:</b> S0158P	<b>Job Code:</b> S0159P
<b>Grade Level:</b> 58 <b>Exemption:</b> Exempt	<b>Grade Level:</b> 59 <b>Exemption:</b> Exempt
<b>Effective/Revision Date:</b> December 2018	<b>Effective/Revision Date:</b> December 2018
<b>Job Summary</b>	
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.	Lead financial aid activities such as aid analysis and evaluation, debt counseling, and financial aid reporting in accordance with university and departmental policies.
<b>Core Duties</b>	
<ul style="list-style-type: none"> <li>• Evaluate and analyze financial information submitted by applicants, ensuring data is accurate and compliant, and process awards</li> <li>• Function as subject matter expert or project lead</li> <li>• Conduct needs analysis and prepare financial aid awards for students, review appeals for applicants requesting additional financial assistance</li> <li>• Counsel prospective and current students, and families, on financial planning and financial assistance; develop and lead information and recruitment sessions</li> <li>• Collaborate with management to develop strategic goals for financial aid</li> <li>• Develop specialized financial aid reports to track awards, trends, etc.; analyze data and make recommendations for use in strategic planning</li> <li>• May provide coaching and staff training</li> <li>• Develop and evaluate financial aid materials and procedures for communicating critical aid processes, awards, and debt information to students</li> <li>• Assist senior management in formulating financial aid policies and procedures; make recommendations to improve overall administration</li> <li>• Ensure compliance with federal, state and institutional financial aid requirements and auditing standards</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluate and analyze financial information submitted by applicants, ensuring data is accurate and compliant, and process awards</li> <li>• Function as subject matter expert or project lead</li> <li>• Conduct needs analysis and prepare financial aid awards for students, review appeals for applicants requesting additional financial assistance</li> <li>• Counsel prospective and current students, and families, on financial planning and financial assistance; develop and lead information and recruitment sessions</li> <li>• Advise management on strategic goals for financial aid</li> <li>• 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</li> <li>• May provide coaching and staff training</li> <li>• Develop communications strategies, procedures and materials for communicating critical aid processes, awards and debt information to students</li> <li>• Identify areas for efficiency or improvement within existing policies and procedures; recommend improvements</li> <li>• Ensure compliance with federal, state and institutional financial aid requirements and auditing standards</li> </ul>

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Basic Qualifications	Basic Qualifications
<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 7 years' relevant work experience</li> </ul>	<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 8 years' relevant work experience</li> </ul>
Additional Qualifications and Skills	Additional Qualifications and Skills
<ul style="list-style-type: none"> <li>• Master's degree in relevant field preferred</li> <li>• Knowledge of Microsoft Office Suite, advanced Excel skills</li> <li>• Advanced knowledge of financial aid processes</li> <li>• Communication skills (both written and verbal), including specifically: the ability to make presentations to large groups of students, parents and alumni</li> </ul>	<ul style="list-style-type: none"> <li>• Master's degree in relevant field preferred</li> <li>• Knowledge of Microsoft Office Suite, advanced Excel skills</li> <li>• Advanced knowledge of financial aid processes</li> <li>• Communication skills (both written and verbal), including specifically: the ability to make presentations to large groups of students, parents and alumni</li> </ul>
Certificates and Licenses	Certificates and Licenses
Physical Requirements	Physical Requirements
<ul style="list-style-type: none"> <li>• Sitting, near vision use for reading and computer use for extended periods of time</li> <li>• Lifting (approximately 20 to 30 pounds), bending, and other physical exertion</li> </ul>	<ul style="list-style-type: none"> <li>• Sitting, near vision use for reading and computer use for extended periods of time</li> <li>• Lifting (approximately 20 to 30 pounds), bending, and other physical exertion</li> </ul>
Working Conditions	Working Conditions
<ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> <li>• Travel may be required</li> <li>• May be required to work nights and weekends</li> </ul>	<ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> <li>• Travel may be required</li> <li>• May be required to work nights and weekends</li> </ul>

## Job Family Matrix

<b>Job Function:</b> Faculty and Student Services		<b>Job Family:</b> Financial Aid - Management	
<b>Job Family Summary:</b> 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.			
<b>Job Title:</b> FSS Financial Aid Mgt I		<b>Job Title:</b> FSS Financial Aid Mgt II	
<b>Job Code:</b> S0155M		<b>Job Code:</b> S0156M	
<b>Grade Level:</b> 55 <b>Exemption:</b> Exempt		<b>Grade Level:</b> 56 <b>Exemption:</b> Exempt	
<b>Effective/Revision Date:</b> December 2018		<b>Effective/Revision Date:</b> December 2018	
<b>Job Summary</b>		<b>Job Summary</b>	
Supervise financial aid activities in accordance with established federal and university standards and guidelines.		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.	
<b>Core Duties</b>		<b>Core Duties</b>	
<ul style="list-style-type: none"> <li>• 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</li> <li>• Supervise financial aid award process including application processing, award determination and dissemination and applicant advising</li> <li>• Plan and administer financial aid events and counseling sessions</li> <li>• May plan and manage departmental budget</li> <li>• Prepare and analyze financial aid reports to track trends</li> <li>• Monitor technology systems and provide training</li> <li>• Assist in developing departmental policies and procedures, recommend improvements</li> <li>• Ensure compliance with federal, state and institutional financial aid requirements and auditing standards</li> </ul>		<ul style="list-style-type: none"> <li>• 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</li> <li>• Manage financial aid operations including application processing, and award determination</li> <li>• Counsel prospective and current students, and families, on financial planning and financial assistance</li> <li>• Develop and plan financial aid information sessions and events</li> <li>• Participate in financial aid strategy development to meet the needs of students</li> <li>• May plan and manage departmental budget</li> <li>• Prepare and analyze financial aid reports to track trends</li> <li>• Manage technology systems and provide training</li> <li>• Assist in developing departmental policies and procedures, recommend improvements</li> <li>• Ensure compliance with federal, state and institutional financial aid requirements and auditing standards</li> </ul>	
		<ul style="list-style-type: none"> <li>• 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</li> <li>• Oversee financial aid operations including application processing, needs evaluation, applicant advising and event planning</li> <li>• Counsel prospective and current students, and families, on financial planning and financial assistance</li> <li>• Contribute to financial aid strategy development to meet the needs of students</li> <li>• May plan and manage departmental budget</li> <li>• Prepare and analyze financial aid reports to track trends</li> <li>• Provide training on relevant regulations, new technology, or new procedures</li> <li>• Evaluate departmental policies and procedures and recommend improvements</li> <li>• Ensure compliance with federal, state and institutional financial aid requirements and auditing standards</li> </ul>	

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Additional Qualifications and Skills	Additional Qualifications and Skills	Additional Qualifications and Skills
<ul style="list-style-type: none"> <li>• Supervisory experience</li> <li>• Knowledge of Microsoft Office Suite, intermediate Excel skills</li> <li>• Working knowledge of financial aid processes</li> <li>• Communication skills (both written and verbal)</li> </ul>	<ul style="list-style-type: none"> <li>• Supervisory experience</li> <li>• Knowledge of Microsoft Office Suite, intermediate Excel skills</li> <li>• Working knowledge of financial aid processes</li> <li>• Communication skills (both written and verbal)</li> </ul>	<ul style="list-style-type: none"> <li>• Supervisory experience</li> <li>• Master's degree in relevant field preferred</li> <li>• Knowledge of Microsoft Office Suite, advanced Excel skills</li> <li>• Advanced knowledge of financial aid processes</li> <li>• Communication skills (both written and verbal)</li> </ul>
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<b>Effective/Revision Date:</b> December 2018		<b>Effective/Revision Date:</b> December 2018	
<b>Job Summary</b>		<b>Job Summary</b>	
Lead financial aid operations and oversee compliance to ensure that all processes are in accordance with established federal and university standards and guidelines.		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.	
<b>Core Duties</b>		<b>Core Duties</b>	
<ul style="list-style-type: none"> <li>• 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</li> <li>• 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</li> <li>• Lead financial audits to ensure program compliance with federal and institutional regulations; make corrections as necessary</li> <li>• May plan and manage departmental budget</li> <li>• Design and create complex reports to support financial aid goals; analyze financial aid metrics to support strategic planning</li> <li>• Manage financial information systems and advise on future technology strategy and needs</li> <li>• Assist in formulating financial aid policies and procedures; advise department managers and staff on financial aid policies</li> <li>• Ensure compliance with federal, state and institutional financial aid requirements and auditing standards</li> </ul>		<ul style="list-style-type: none"> <li>• 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</li> <li>• 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</li> <li>• Direct the audit review process to ensure program compliance with federal and institutional regulations</li> <li>• May plan and manage departmental budget</li> <li>• Develop financial aid reports, analyze data and trends to refine procedures, policies and practice</li> <li>• Monitor technologies, systems and business processes; develop, enhance and implement processes</li> <li>• Collaborate with leadership to continuously improve financial aid policies</li> <li>• Ensure compliance with federal, state and institutional financial aid requirements and auditing standards</li> </ul>	
		<ul style="list-style-type: none"> <li>• 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</li> <li>• Determine strategic direction of department by establishing goals and implementing new financial aid initiatives</li> <li>• Direct all aspects of the financial aid function including application processing, needs evaluation, award determination and financial aid advising</li> <li>• Develop and implement a strategic financial aid plan to meet the needs of students and ensure a diverse community</li> <li>• Oversee financial aid reporting and analysis to be used in budget development, compliance, funding applications and overall strategic planning</li> <li>• Oversee complex information systems; assess existing technologies, identify areas for improvements and implement solutions</li> <li>• May develop, manage and oversee departmental budget</li> <li>• Develop, implement and provide interpretation of admissions policies and procedures</li> <li>• Ensure compliance with federal, state and institutional financial aid requirements and auditing standards</li> </ul>	

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<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• A minimum of 7 years' relevant work experience</li> </ul>	<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 8 years' relevant work experience</li> <li>• Supervisory experience</li> </ul>	<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 10 years' relevant work experience</li> <li>• Supervisory experience</li> </ul>
Additional Qualifications and Skills	Additional Qualifications and Skills	Additional Qualifications and Skills
<ul style="list-style-type: none"> <li>• Supervisory experience</li> <li>• Master's degree in relevant field preferred</li> <li>• Knowledge of Microsoft Office Suite, advanced Excel skills</li> <li>• Advanced knowledge of financial aid processes</li> <li>• Communication skills (both written and verbal)</li> </ul>	<ul style="list-style-type: none"> <li>• Master's degree in relevant field preferred</li> <li>• Knowledge of Microsoft Office Suite, advanced Excel skills</li> <li>• Advanced knowledge of financial aid processes</li> <li>• Communication skills (both written and verbal)</li> </ul>	<ul style="list-style-type: none"> <li>• Master's degree in relevant field preferred</li> <li>• Knowledge of Microsoft Office Suite, advanced Excel skills</li> <li>• Advanced knowledge of financial aid processes</li> <li>• Communication skills (both written and verbal)</li> </ul>
Certificates and Licenses	Certificates and Licenses	Certificates and Licenses
Physical Requirements	Physical Requirements	Physical Requirements
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