

University Information

Org/College: Office of the Provost	Department: Office of Student Financial Aid
UI Job Code: PCF1	Pay Level: 3A
Job Function: Academic Support	Job Family: Financial Aid Services
University Classification: Financial Aid Counselor	

Department Information

Org/Dept/Sub-dept #: 02-4666-00000 – Financial Aid/Office of the Provost
Position #: 00191309
Working Title (if applicable): Financial Aid Advisor: Advising, Financial Literacy, and Outreach
This Position Reports to (Title/Position #): Associate Director, Advising, Financial Literacy and Outreach
Position Has Administrative Supervision? No
Position Overview: Educate and advise students and parents regarding financial aid options, policies, and procedures according to US Department of Education regulations and professional judgment guidelines. Promote financial literacy through individual student meetings and group presentations.

Position Information

Key Areas of Responsibility

Evaluate and Analyze Application Information/Reviews Standards and Regulations; Awards Financial Aid Award/Package (Both Need-and Merit-Based) (PCF1): *Review data and make routine decisions based on established criteria. May be responsible for recommendations that may override established criteria based on expert knowledge. Communicate information regarding implementation to current staff. Communicate defined standards and regulations.*

- Revise financial aid awards according to special circumstance requests, appeals, and professional judgment decisions.
- Complete consortium agreements for students studying through other institutions/programs that require unique cost of attendance adjustments.
- Additional adjustments made based on changes in enrollment hours and costs, additional financial aid received, or at the request of the student.

One-on-One Consultation and/or Outreach Services (PCF1): *Provide information to current and prospective students and their families regarding financial aid policies, procedures, application processes and financial aid options. Develop training materials related to the awarding process. Instruct, educate and interact with students, parents, general public and UI departments regarding application policies and procedures, types of financial aid, and disbursement of funds. Define framework for routine and non-routine communication.*

- Educate and advise parents and current and prospective students in-person, via email, and by phone regarding financial aid policies, procedures, application processes, and federal, state, and institutional aid programs. Counseling involves detailed communication, in sometimes highly charged emotional situations.
- Represent the Office of Student Financial Aid at outreach events, including the presentation of financial aid information at various workshops, orientation sessions, and Admissions recruiting trips. Information presented to small and large groups (300+) including prospective students, parents and guidance counselors.
- Provide individualized loan counseling to students borrowing private, federal, and institutional loans to encourage minimization of debt.
- Utilize problem-solving skills to assist students experiencing financial difficulties to develop plans that encourage retention and on-time graduation.
- Develop training materials related to financial literacy for undergraduate and graduate students.
- Present financial literacy information to enhance student knowledge and skills in order to manage financial resources effectively.

- Implement default prevention plan to assist former students in avoiding default on federal student loans.
- Serve on various internal and external committees, as well as special projects as assigned by administrators.

Data Collection, Analysis, and Reporting (PCF1): *Gather data.*

- Assist in review of students appealing for financial aid eligibility who are not meeting Satisfactory Academic Progress.
- Monitor trends and demographic information in students seeking counseling to improve outreach efforts, presentations, services offered, etc.
- Assist in analysis of data as it relates to student financial concerns.

Universal Competencies

Collaboration/Positive Impact

Proficiency Level: Working

Ability to work with a variety of individuals and groups in a constructive and civil manner and utilize existing resources and learning to achieve or exceed desired outcomes of current and future organizational goals/needs.

- Shares appropriate information/feedback openly, professionally and respectfully.
- Models open, respectful, accepting, and supportive behaviors with team members.
- Maintains productive work relationships while considering multiple perspectives and using effective conflict resolution practices.
- Aligns expectations for self and team to achieve work objectives and overcome obstacles.

Diversity, Equity and Inclusion

Proficiency Level: Working

Ability to work with a variety of individuals and groups in a constructive and respectful manner while appreciating the unique contribution of an inclusive workforce that brings together the talents of people across multiple identities, including: race, creed, color, religion, national origins, age, sex, pregnancy, disability, veteran or military status, sexual orientation, gender identity, or associational preferences.

- Maintains productive work relationships while considering multiple perspectives.
- Demonstrates awareness of one’s own and others’ social identities (e.g. race, gender, disability status, religion, etc.) and their relevance in the workplace.
- Resolves cross-cultural conflicts effectively.
- Articulates the unit’s commitment to diversity, equity and inclusion and the reasons for its importance.
- Engages in personal and professional development on issues related to diversity, equity and inclusion.

Service Excellence/Customer Focus

Proficiency Level: Working

Ability to meet or exceed customer service needs and expectations and provide excellent service in a direct or indirect manner. Ability to effectively transmit and interpret information through appropriate communication with internal and external customers.

- Enhances service by seeking ways to add value to customer interactions/services.
- Demonstrates sincere concern and takes responsibility when a customer complains, even if the cause of the problem lies elsewhere.
- Listens to feedback without defensiveness and uses it to enhance communication effectiveness.
- Communicates in alternative ways to accommodate different listeners.

As part of performing the key areas of responsibility and competencies described above, staff members are expected to meet reasonable standards of work quality and quantity, as well as expectations for attendance established by their supervisor. Staff members are also expected to comply with policies governing employee responsibilities and conduct, including those contained in the [University Operations Manual](#)

Position Technical Competencies and Proficiency Levels

Accuracy and Attention to Detail

Proficiency Level: Working

Understanding of the necessity and value of accuracy and attention to detail; ability to process information with high levels of accuracy.

- Processes detailed information with good accuracy.
- Utilizes specific approaches and tools for checking and cross-checking outputs.
- Develops and uses checklists to insure that information goes out error-free.
- Accurately gauges the impact and cost of errors, omissions, and oversights.
- Learns from mistakes and applies lessons learned.

Data Gathering and Analysis

Proficiency Level: Working

Knowledge of data gathering and analysis tools, techniques and processes; ability to use these to gather and analyze data for a specific or variety of needs and/or projects.

- Participates in gathering and analyzing data for a project or projects.
- Utilizes the basic data collection and evaluation tools and techniques.
- Follows proper data gathering and analysis processes and policies.
- Reports problems that arise in the data collection process.
- Reviews the results to ensure the quality and accuracy of data gathering and analysis.

Decision Making and Critical Thinking

Proficiency Level: Working

Understanding of the issues related to the decision-making process; ability to analyze situations fully and accurately, and reach productive decisions.

- Assists in assessing risks, benefits and consideration of alternatives.
- Participates in documenting data, ideas, players, stakeholders, and processes.
- Applies an assigned technique for critical thinking in a decision-making process.
- Recognizes, clarifies, and prioritizes concerns.
- Identifies, obtains, and organizes relevant data and ideas.

Financial Aid Programs and Policies

Proficiency Level: Basic

Knowledge of and the ability to develop and implement financial aid programs and policies to attract outstanding students and help them finance their course of study.

- Lists types of major financial aid for undergraduate and post-graduate students.
- Identifies current institutional policies related to financial aid.
- Explains the application procedures for each type of financial aid program.
- Describes the laws and regulations related to financial aid in federal, state, or commercial loans.

Resource Management

Proficiency Level: Basic

Plans, mobilizes and distributes resources to fulfill business objectives and plans.

- Identifies the key resources at hand to fulfill own responsibilities.
- Demonstrates the ability to apportion resources to different components of a task.
- Applies the concept of sustainability to conserve and reuse resources where possible.
- Seeks help to obtain additional resources when necessary.

Effective Communications

Proficiency Level: Working

Understanding of effective communication concepts, tools and techniques; ability to effectively transmit, receive, and accurately interpret ideas, information, and needs through the application of appropriate communication behaviors.

- Makes oral presentations and writes reports needed for own work.
- Avoids technical jargon when inappropriate.
- Looks for and considers non-verbal cues from individuals and groups.
- Listens to feedback without defensiveness and uses it for own communication effectiveness.
- Delivers helpful feedback that focuses on behaviors without offending the recipient.

Interpersonal Relationships

Proficiency Level: Working

Knowledge of the techniques and the ability to work with a variety of individuals and groups in a constructive and collaborative manner.

- Collaborates with departmental associates and management.
- Adapts interaction style to situations and people.
- Identifies roles and responsibilities for self and others.
- Demonstrates an understanding of alternative points of view.
- Explains impact of interactions with individuals and groups.

Position Qualifications (for recruiting only)

Education or Equivalency Required

- Bachelor's degree or an equivalent combination of education and experience is required.

Experience Required

- Experience working in a post-secondary academic setting or in another sector dealing with budgeting, counseling, and/or education, typically six months to one year.

Competencies Required

- Facilitating student development, success, and outcomes: Demonstrates a working proficiency in the ability to work developmentally with students; ability to promote student learning development, and success by applying advising approaches to diverse individual student situations.
- Communicating for effective relationships: Demonstrates a working proficiency, knowledge and application of the communication techniques and relationship building skills that develop the ability to work with a variety of individuals and groups in a constructive and collaborative manner.
- Effective presentation skills: Demonstrates a working proficiency in preparing and delivering effective presentations; typically demonstrated with six months to one year of public speaking.
- Accuracy and attention to detail: Demonstrates a working proficiency in understanding of the necessity and value of accuracy and attention to detail; ability to process information with high levels of accuracy.
- Data gathering and analysis: Demonstrates a working proficiency and knowledge of data gathering and analysis tools, techniques and processes; ability to use these to gather and analyze data for a specific or variety of needs and/or projects.
- Working proficiency with Microsoft Excel, Word, and Outlook.

Desirable Qualifications

- M.A. degree in Student Development or related field is desirable.
- Demonstrates a [Basic proficiency level](#) in:
 - The knowledge of University of Iowa policies, procedures, and regulations.
- Demonstrates a [Working proficiency level](#) in:
 - The knowledge of and the ability to develop and implement financial aid programs and policies to attract outstanding students and help them finance their course of study.
 - The knowledge of needs analysis and federal verification along with a basic understanding of Federal Methodology.