## Logo  Description automatically generatedOffice of Student Financial Aid, Office of the Executive VP and Provost

|  |
| --- |
| **POSITION OVERVIEW** |
| **Department:** [Office of the Provost](https://provost.uiowa.edu/), [Office of Student Financial Aid](https://financialaid.uiowa.edu/) |
| **University Classification:** Business Analyst Coordinator  | **UI Job Code:** PAB2 |
| **Job Function:** Administration (PA)  | **Job Family:** [Business Analyst](https://hris.uiowa.edu/job-descriptions/) |
| **Working Title (if applicable):** Data and Reporting Manager |
| **Position #:**00262521 | **Percent of Time:** 100%  | **Type:** Ongoing, Regular P&S |
| **Org/Dept/Sub-Dept #:**02-4666-00000  | **Administrative Supervisor:** [ ]  **Yes** [x]  **No** |
| **This Position Reports to** (Name and Position #)**:** Sr. Assoc. Director, Systems & Award Management (#00119787); Brenda Buzynski  |
| **Position Summary:**  This role will assist with the coordination of various data needs for the Office of Student Financial Aid. Tasks may include coordinating Jiras, testing outputs and enhancements to office systems, managing office reporting to Federal and external agencies, and collaborating with IT and other Data Analytics teams across the university. This person will need to manage/execute SQL queries. This role plays a crucial part in supporting the office, determining areas for improvement, and working closely with the team to ensure our work is being done as efficiently as possible. This role would also provide general overview/training on MAUI to staff. |
| **Compensation:** $51,000 - commensurate (based on education and experience) |
| **WHAT YOU DO** |
| **Existing Process/System Monitoring, Evaluation, and Reengineering** (PAB2)*Identify business system solution requirements by analyzing work processes and operations. Create problem escalation plans and manage reporting processes. Monitor issues escalated to technical support staff to ensure proper resolution has been implemented. Assist in researching & contributing to development of cost-benefit analyses of alternatives. Assist in and maintain delivered solutions.** MAUI Student Information Systems Duties & Tasks:
	+ Attend weekly meetings with the MAUI Financial Aid team to learn the functionality of Maui and best practices for utilizing the Jira Software, our Project Management System.
	+ Assist with coordinating the function and use of Jiras in our Project Management System. This includes the submission of Jiras, tracking progress of work on the Jira, capturing input from other financial aid staff, and adding key information to Jiras.
	+ Assist with developing timelines and deadlines of work to be completed in MAUI.
	+ Develop a comprehensive calendar of Jiras to be submitted on an annual basis.
	+ Review and test outcomes from the work completed as requested on a Jira. This requires working in various FINAID-TEST and MyUI Test environments.
	+ Learn the MAUI infrastructure and design.
	+ Utilize Wiki pages to help document and refer to MAUI operational notes.
	+ Develop a working knowledge of the annual financial aid awarding guidelines that are programmed for batch packaging in MAUI and the MAUI re-award system.
	+ Understand the scholarship awarding practices of Admissions, Financial Aid, and Academic Works (Portal) awards and how they impact financial aid offers.
 |
| **New Process/System Design and Testing** (PAB2)*Prepare content builds, programs, and/or modify system tables and setting to create application programs and reports. Test system changes for usability, performance and adherence to standards. Verify results with stakeholders.** Assist with the set-up of annual student cost of attendance budgets.
* Includes coordinating the capturing of key annual student session dates and costs for academic programs. Specifically, the Undergraduate, Graduate, and numerous Professional academic programs that vary in their student session set-up, academic calendars, and various costs. Need to collaborate with college stakeholders and set-up student budgets in MAUI in a timely manner.
* Test budget set-up, run multiple simulations by college, by student type, and different sessions.
* Interpret, analyze and understand the set-up of the MAUI system, and propose any obstacles or barriers to effective implementations and provide suggestions for re-engineering systems and improved process design.
* Understand the integration of student budget set-up into the awarding programming and processes.
* Review how revising student budgets annually and on a session-basis impacts a student financial aid offer. Develop a working knowledge of the scholarship work-flow processes in financial aid.
* Update annual student budgets on internal working documents, web sites, and printed documents as needed.

**Support, Training, and Implementation** (PAB2)*Provide moderately complex user support. Develop training materials. Provide individual training and go-live support.** Provide user training on MAUI Financial Aid screens.
* Attend weekly staff meetings and respond to office or institutional needs for data.
* Create and document reports as needed.
* Ensure Maui reports are distributed internally to staff in a timely manner.
* Ask key questions of stakeholders, campus partners, and office staff to access data needs for improving processing performance needs.

**Process/Project Management** (PAB2) *Serve as liaison supporting communication among internal staff to identify and track installation issues. Analyze user feedback and identify recurring, standard revisions and enhancements. Maintain documentation on assigned project requirements.** Develop various project plans and estimate work accordingly so that projects can be completed in a timely manner. This includes proactive planning to work on projects six to twelve months in advance of due dates.
* Manage Office Federal, State, Institutional, and Private reporting requirements.
* Develop a timeline of Federal, State, and Institutional reports to submit and deadlines.
* Work with the MAUI and BI Team to complete reports needed and surveys.
* Update and help design improvements for the Office of Student Financial Aid Web site.
* Explore other digital options for connecting with and reaching out to students to campus partners.
* Assist with designing and implementing surveys on Qualtrics software.

**Reporting and Visualization** (PIX2)*Analyze data integrity and make recommendations regarding the validity of data. Perform intermediate data analysis techniques. Design solutions and programs using data analysis tools and platforms. Provide complex operational end user support. Train technical team members on use of solutions and platforms.** Develop a working knowledge of the data warehouse tables in order to utilize SQL to run reports for the office, enrollment management and other campus partners. Understand concepts of using SQL in programming for managing data held in a database management system.
* Review reports from running queries, Maui reports, and Campus Data tools and reports.
* Work with the BI and MAUI teams along with office staff to complete all annual reports to Federal and external agencies, i.e., FISAP, Board of Regents, Iowa College Aid Commission, etc.
* Develop consistent measures to validate data. Triangulate data as needed to confirm accuracy.
* Work on capturing key data elements to define, update, and change office metrices and key performance indicators as needed.
* Document business rules, policies and procedures pertaining to running MAUI and Campus Data Reports.
* Analyze reports created using data warehouse data to identify issues or possible improvements.
* Analyze data and business needs to recommend ideas for reports, student profile information, and for student survey needs.
* Assist with the organizing of information, metrics, and providing data to campus partners as needed.
* Gather and analyze feedback to develop new or to enhance existing reports for the financial aid office staff and enrollment management needs.
* Attend meetings as needed regarding financial aid data and collaborate with the Enrollment Management Office and other campus partner offices as needed.
* Assist with defining key metrics and the timing of updating key performance and awarding metrics.
 |
|  |
|  |
| **HOW YOU DO YOUR JOB** (see more about competencies and proficiency levels [here](http://hr.uiowa.edu/competencies)) |
| **Collaboration/Positive Impact –** (Extensive Proficiency) *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.**What this looks like:** Ensures time, resources, energy, learning opportunities, and actions are focused on priorities important to the changing workplace.
* Identifies and resolves disagreements/conflicts in early stages.
* Promotes a safe, fair, respectful environment in which concerns can be addressed effectively.
* Recommends changes to work practices and policies to achieve desired outcomes.

**Diversity, Equity, and Inclusion –** (Working Proficiency)*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.**What this looks like:** 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 –** (Extensive Proficiency) *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.**What this looks like:* * Participates in developing a variety of effective ways to deal with service challenges.
* Models service delivery and coaches others to deliver excellent service in a variety of settings.
* Communicates well with direct reports, peers, leadership and external constituents.
* Utilizes various methods for information sharing and information gathering. Modifies processes to enhance service.

**Business Process Design –** (Extensive Proficiency)*Knowledge of business process design techniques that encourage a critical, fresh look at key processes and focus on optimizing organizational performance; ability to apply this knowledge appropriately to diverse situations.**What this looks like:* * Has led multiple business process design or re-engineering initiatives.
* Trains others to identify and implement required infrastructure to support specific processes.
* Assesses potential implications of re-engineering for multiple functions or departments.
* Demonstrates mastery of re-engineering concepts, methods, and tools.
* Redesigns or enhances business processes to meet regulatory requirements.
* Participates in design and implementation of a supporting organizational structure.
 |
| **Process Management –** (Working Proficiency) *Knowledge of business process improvement tools and techniques and ability to understand, monitor, update, or enhance existing business or work processes.**What this looks like:* * Walks through steps, decisions, measurements, dependencies and hand-offs for a specific process.
* Creates process flow or work flow diagrams.
* Identifies and monitors common process bottlenecks.
* Employs process flows, cycle time, process time and waste concepts as appropriate.
* Documents types of process decisions and potential impact of each decision.

**Project Management –** (Working Proficiency)*Ability to plan, organize, monitor, and control projects, ensuring efficient utilization of technical and administrative resources, to achieve project objectives.**What this looks like:** Plans, estimates, and executes relatively simple projects.
* Assists in detailed project plans including cost, schedule, and resource requirements.
* Asks key questions of stakeholders during the planning stage.
* Provides input to track project progress and status.
* Produces standard project status reports.

**Training and Development –** (Working Proficiency) *Knowledge of employee training and development methodologies; ability to ensure that a target population has the knowledge and skills required to meet both tactical and strategic objectives.**What this looks like:* * Follows appropriate processes used in assessing the learning needs of a target population.
* Develops live and media-based instructional programs using proper training methods.
* Implements training processes for discovering the learning needs of employees.
* Provides guidance and support to ensure that participants using self-study methods meet their learning goals.
* Explains the methods used in the evaluation of learning outcomes.

**Core Application Systems –** (Working Proficiency) *Plans, mobilizes, and distributes resources to fulfill business objectives and plans.**What this looks like:* * Works with core application systems for a major business unit or function.
* Identifies key players, criticalities, roles, and responsibilities.
* Investigates application-related issues with both business and IT professionals.
* Helps create contingency plans to mitigate impact of disruption on core applications.
* Recommends enhancements for a major application system or related subsystems.

**Effective Communication –** (Working Proficiency) *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.**What this looks like:* * 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.

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](http://www.uiowa.edu/~our/opmanual/). |
|  |
|  |
| **POSITION QUALIFICATIONS** |
| Required* Bachelors Degree or an equivalent combination of education, experience or comparable expertise is required.
* Six months to one year in a professional data focused role or a combination of education and employment experience, including related internships for a recent college graduate.
* Working level of proficiency and understanding of SQL
* Experience working with and writing queries using SQL and warehouse data

 Desired* Experience with Jira or other project management software
* Experience with MAUI Student Information System
* Experience with Microsoft Access or DbVisualizer
* At least one year of experience in a higher education setting
* At least one year of experience in a financial aid office setting
 |