Opportunity: Office of Student Financial Aid Opportunity at the University of Iowa

POSITION OVERVIEW

| Department: | Office of the Student Financial Aid, Office of the Provost |
| University Classification: | Financial Aid Manager |
| UI Job Code: | PCF2 |
| Pay Level: | 4A |
| Working Title: | Assistant Director, Service Operations and Outreach |
| Percent Time: | 100% (40hrs/wk.) |
| Administrative Supervisor: | ☒ Yes ☐ No |
| Reports to: | Associate Director, Advising, Financial Literacy & Outreach |
| Compensation: | $49,000 to commensurate anticipated hiring annual salary range; Competitive benefits |

POSITION SUMMARY

Supervise a team of student employees who are the front-line staff for the Office of Student Financial Aid. Hire and train student staff. Assess and recommend ways to improve the student and visitor experience through phone, in person, Zoom, and email interactions. Manage outreach projects to proactively inform students about financial aid issues. Assist with scheduling and training of financial aid advising professional staff. Represent the Office of Student Financial Aid at outreach events and presentations as needed.

WHAT YOU DO

Leadership and Supervision
- Provides coordination and supervision of financial aid service operations to ensure exceptional service to a diverse community of students.
- Monitors customer contacts to ensure quality and accuracy of information being delivered. Following departmental policies and procedures, assists student employees with challenging service situations.
- Supervises a team of student employees who have responsibility for delivering quality and efficient customer service by phone, email, and in person to prospective students and their parents, currently enrolled students, and students who have graduated or withdrew from the University.
- Documents student employee attendance and approves reported hours worked. Addresses any attendance or performance issues with student employee staff. Evaluate student employee performance on a regular basis.
- Coordinates the selection, interviewing and hiring of student employees.
- Develop training materials related to financial aid advising for student staff.
- Provide functional supervision for financial aid advising team, assist with scheduling, training, and other duties as needed for the advising team.
- Provide leadership support to the Associate Director for Advising, Financial Literacy and Outreach. Act as team lead in the absence of the Associate Director.

Data Collection, Analysis and Reporting
- Monitor trends and demographic information in students interacting with the Office of Student Financial Aid to improve outreach efforts, presentations, services offered, etc.
- Assist in collection, analysis, and reporting of data as it relates to student interactions with the Office of Student Financial Aid. Data may come from SWIPE, Clarity Connect, general email traffic and other sources of student interaction.
- Utilize data and creative problem-solving skills to recommend and implement improvements to services offered.

Budget Oversight Management
- Monitor student staff salary budget with input from leadership team in order to employ an appropriate number of student staff.
- Make recommendations for student staff pay rate increases.
### One-on-One Consultation and/or Outreach Services

- Educate and advise parents and current and prospective students regarding financial aid policies, procedures, application processes, and federal, state, and institutional aid programs as needed.
- 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.
- Utilize problem-solving skills to assist students experiencing financial difficulties to develop plans that encourage retention and on-time graduation.
- Assist in making recommendations for outreach based on consultation with the office leadership team and analysis of student interaction data and student needs.
- Serve on various internal and external committees, as well as special projects as assigned by administrators.

### Evaluate and Analyze Application Information/Reviews Standards and Regulations; Awards Financial Aid Award/Package (Both Need-and Merit-Based)

- Oversee student staff projects which may require financial aid adjustments and require knowledge of financial aid regulations and office policies.
- Revise financial aid awards according to special circumstance requests, appeals, and professional judgment decisions as needed.
- Additional adjustments made based on changes in enrollment hours and costs, additional financial aid received, or at the request of the student as needed.

### HOW YOU DO YOUR JOB (learn more about competencies and proficiency levels [here](#))

#### Accuracy and Attention to Detail – Proficiency: Extensive

*What this looks like:*

- Processes detailed information with high levels of accuracy.
- Productively balances speed and accuracy.
- Implements a variety of cross-checking approaches and mechanisms.
- Evaluates and makes contributions to best practices.
- Demonstrates expertise in quality assurance tools, techniques, and standards.
- Employs techniques for motivating personnel to meet or exceed accuracy goals.

#### Data Gathering and Analysis – Proficiency: Extensive

*What this looks like:*

- Oversees data gathering and analysis activities for the project(s).
- Advises on advanced data gathering and analysis methodologies and technologies.
- Evaluates the pros and cons of various data analysis methods for the project(s).
- Implements procedures and policies within a data processing function.
- Teaches others how to improve the validity and reliability of data used in various analyses.
- Evaluates best practices of data gathering and analysis.

#### Decision Making and Critical Thinking - Proficiency: Extensive

*What this looks like:*

- Uses effective decision-making approaches such as consultative, command, or consensus.
- Differentiates assumptions, perspectives, and historical frameworks.
- Leverages experience in analyzing relevant data and assessing implications of alternatives.
- Identifies decision options and points and predicts their potential impact.
- Evaluates past decisions for insights to improve decision-making process.
- Makes sure assumptions and data are objectively analyzed in decisions.
Financial Aid Programs and Policies – Proficiency: Extensive

What this looks like:
- Develops student financial support programs using funds from external sponsors and organizations.
- Coordinates with related departments about financial aid programs.
- Addresses all student inquiries directly related to student financial plans.
- Maximizes financial support to best meet students and their families needs.
- Monitors financial aid accounts to ensure correct funding and balances.
- Negotiates payment plans, financial aid awards, and loan applications with the university, faculty, banks, and other related parties.

Resource Management – Proficiency: Extensive

- Specifies the critical resource needs required to accomplish organizational objectives.
- Mobilizes resources needed to get things done.
- Negotiates with key stakeholders to obtain required resources.
- Applies specific metrics to analyze and revise resource requirements.
- Develops methods for maximizing resource utilization (re-engineering, outsourcing, automation, etc.).
- Updates resource requirements by identifying and responding to changing needs.

Effective Communications – Proficiency: Extensive

- Communicates well downward, upward, and outward.
- Employs appropriate methods of persuasion when soliciting agreement.
- Maintains focus on the topic at hand.
- Adapts documents and presentations for the intended audience.
- Reviews others’ writing or presentations and provides feedback and coaching.
- Demonstrates both empathy and assertiveness when communicating a need or defending a position.

Team Management and Team Building – Proficiency: Extensive

- Leads the definition of team mission and objectives for a variety of teams.
- Employs appropriate techniques for maintaining team enthusiasm, energy, and focus.
- Communicates both within the team and to stakeholders.
- Ensures that team members are on board, unified, and moving in the same direction.
- Learns and utilizes special talents and work styles of team members.
- Brings projects to closure and ensures capture of what can be learned from the experience.

Interpersonal Relationships – Proficiency: Extensive

- Establishes and maintains productive working relationships within and outside of own area.
- Contributes as a member on a variety of teams.
- Establishes and maintains credibility with clients and teammates.
- Seeks out what's common in conflicting points of view.
- Resolves potentially harmful differences between individuals and groups of people.
- Influences key individuals inside and outside own group and earns their respect.

UNIVERSITY EXPECTATIONS (see definitions and proficiency levels here)

Collaboration/Positive Impact - Proficiency: Extensive

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.
Diversity, Equity and Inclusion – Proficiency: Extensive

What this looks like:

- Promotes a respectful, diverse, equitable and inclusive work environment in which concerns are addressed effectively.
- Can identify unit policies and practices that have a disparate impact on specific populations.
- Recommends policies and practices to advance an equitable, inclusive work environment and counter racism, sexism, and other forms of institutional bias.
- Forms respectful relationships with those representing diverse constituencies, and seeks regular input to better understand diversity, equity & inclusion issues and enhance recruitment efforts.
- Engages in on-going self-reflection and continues to advance their knowledge and skills related to diversity, equity and inclusion.

Service Excellence/Customer Service – Proficiency: Extensive

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.

QUALIFICATIONS YOU BRING

Required:

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

Demonstrates an EXTENSIVE proficiency level in:

- Financial aid programs and policies: 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.
- Facilitating student development, success, and outcomes: 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: 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: preparing and delivering effective presentations; typically demonstrated with six months to one year of public speaking.
- Accuracy and attention to detail: 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: 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.
- Proficiency with Microsoft Excel, Word, and Outlook.

Desired:

- Experience working with financial aid policies and procedures, typically one year.
- M.A. degree in Student Development or related field is desirable.
- Demonstrates a basic knowledge of University of Iowa policies, procedures, and regulations.
- Some experience supervising student staff or other employees, typically 6 months to one year, is desirable. The knowledge of needs analysis and federal verification along with a basic understanding of Federal Methodology.
The Office of Student Financial Aid assists students with the costs of their educational investment. Our committed team of professionals works in partnership with families, providing information on available options and assisting with the financial aid process.