



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

Position #: 00112441

Working Title (if applicable): Financial Aid Advisor – Advising, Financial Wellness & Outreach

This Position Reports to (Title/Position #): Associate Director, Advising, Financial Literacy & Outreach

Position Has Administrative Supervision? ☒ No ☐ Yes

Position Information

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.

Salary: \$41,541-\$44,000

Campus Location: UCC

Work Modality: Hybrid

Percent Time: 100%

What You Do: (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.

<p>Records Management (PCR3): <i>May be the Registrar for a college or division. Manage collegiate and/or University student academic records operation. Provide feedback and offer suggestions regarding policies and practices. Respond to requests for information from federal and state government, accrediting bodies and other external agencies.</i></p>	<ul style="list-style-type: none"> • Direct and oversee Big10 Academic Alliance CourseShare, Traveling Scholar, and Regents Exchange Program registration and grade entry transactions throughout the session. • Support Postsecondary Education Opportunity (PSEO) student registration. • Manage bulk registrations and changes for special and summer special programs. • Manage cohort uploads prior to early registration. • Monitor Success at Iowa enrollment – preparing the orientation auto-registration configuration table, updating hours changes, and adjusting associated fees, if necessary.
<p>One-on-One Consultation and/or Outreach Services (PCF1): <i>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.</i></p>	<ul style="list-style-type: none"> • 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 (100+) 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.
<p>Data Collection, Analysis, and Reporting (PCF1): <i>Gather data.</i></p>	<ul style="list-style-type: none"> • 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.
<p>Universal Competencies</p>	
<p>Collaboration/Positive Impact: <i>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.</i></p>	<p>Proficiency Level: WORKING</p> <ul style="list-style-type: none"> • 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.

Service Excellence/Customer Focus: <i>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.</i>	Proficiency Level: WORKING <ul style="list-style-type: none"> • 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.
Welcoming and Respectful Environment: <i>Ability to foster a welcoming and respectful workplace environment while recognizing personal differences. Ability to work with a variety of individuals and groups in a constructive and respectful manner while appreciating the importance of a workforce that benefits from the talents of all people across multiple characteristics, including: race, creed, color, religion, national origin, age, sex, pregnancy (including childbirth and related conditions), disability, genetic information, status as a U.S. veteran, service in the U.S. military, sexual orientation, gender identity, or associational preferences.</i>	Proficiency Level: WORKING <ul style="list-style-type: none"> • Maintains productive work relationships while considering multiple perspectives. • Resolves cross-cultural conflicts effectively. • Understands and describes the unit's commitment to creating a workplace environment where people of all backgrounds and perspectives feel welcomed and appreciated, and the reasons for its importance. • Contributes to a welcoming and respectful workplace environment as described above; reports disrespectful or non-welcoming behavior to appropriate resources.
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	
How You Do Your Job: (learn about competencies and proficiency levels here)	
Accuracy and Attention to Detail: <i>Understanding of the necessity and value of accuracy and attention to detail; ability to process information with high levels of accuracy.</i>	Proficiency Level: WORKING <ul style="list-style-type: none"> • 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: <i>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.</i>	Proficiency Level: WORKING <ul style="list-style-type: none"> • 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: <i>Understanding of the issues related to the decision-making process; ability to analyze situations fully and accurately, and reach productive decisions.</i>	<p>Proficiency Level: WORKING</p> <ul style="list-style-type: none"> 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: <i>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.</i>	<p>Proficiency Level: BASIC</p> <ul style="list-style-type: none"> 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: <i>Plans, mobilizes and distributes resources to fulfill business objectives and plans.</i>	<p>Proficiency Level: BASIC</p> <ul style="list-style-type: none"> 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 Communication: <i>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.</i>	<p>Proficiency Level: WORKING</p> <ul style="list-style-type: none"> 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: <i>Knowledge of the techniques and the ability to work with a variety of individuals and groups in a constructive and collaborative manner..</i>	<p>Proficiency Level: WORKING</p> <ul style="list-style-type: none"> 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: <i>(for recruiting purposes only, fill when replacing position)</i>	
Education (or equivalency) Required	<ul style="list-style-type: none"> Bachelor's degree or an equivalent combination of education and experience is required.
Experience Required	<ul style="list-style-type: none"> 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	<p>Demonstrates a WORKING PROFICIENCY in:</p> <ul style="list-style-type: none"> Facilitating student development, success, and outcomes: the ability to work developmentally with students; ability to promote student learning

	<p>development, and success by applying advising approaches to varied individual student situations.</p> <ul style="list-style-type: none"> • 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. • Working proficiency with Microsoft Excel, Word, and Outlook.
Desirable Qualifications	<ul style="list-style-type: none"> • M.A. degree in Student Development or related field is desirable. • Demonstrates a Basic proficiency level in: <ul style="list-style-type: none"> ○ The knowledge of University of Iowa policies, procedures, and regulations. • Demonstrates a Working proficiency level in: <ul style="list-style-type: none"> ○ 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.