

## Job Description

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<b>Job Title:</b>	Associate Director, Graduate Financial Aid and Awards
<b>Department:</b>	Graduate Studies and Postdoctoral Affairs
<b>Reports To:</b>	Director, Graduate Academic Services
<b>Jobs Reporting:</b>	Manager, Graduate Financial Aid & Awards Programs (2) Graduate Financial Officer Co-ordinator, Graduate Financial Aid & Awards
<b>Salary Grade:</b>	USG 13
<b>Effective Date:</b>	July 2018

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### **Primary Purpose**

The Associate Director, Graduate Financial Aid & Awards helps oversee the administration and decision-making of internal and external scholarship and award programs for graduate students and postdoctoral fellows that may or may not require University evaluation and adjudication, as well as graduate bursary and loan programs. The incumbent is responsible for and oversees the implementation of University and external policies and regulations with regard to overall awards management including eligibility and funding decisions, marketing of award opportunities to students, and reports on scholarship competition outcomes and statistics to senior administration on a regular basis. S/he is a liaison with external agencies and manages the submission of scholarship decisions or applications on behalf of the University to these agencies as appropriate.

S/he is a resource to department staff and faculty members concerning eligibility criteria for award programs and on the implementation and interpretation of internal and external application program regulations, instructions and guidelines.

The incumbent also works with members of the GSPA systems team and Information Systems & Technology in reviewing current award processes and explores electronic methods of efficiencies to enhance the student, staff and faculty experience.

### **Key Accountabilities**

#### **Supervision, Leadership and Training**

- Hiring, supervision and mentorship of his/her team which includes two Managers, Graduate Financial Aid & Awards Programs, Co-ordinator, Graduate Financial Aid & Awards, Graduate Financial Officer, Graduate Awards Officer and Graduate Financial Aid Records Specialist.
- Oversees and directs his/her team for all daily business processes in their respective tasks.
- Provides supervisory and operational support to his/her team including:
  - Support for job-related training;
  - Encouragement and support for staff participation in personal and professional development opportunities;
  - Providing direction in regards to staff resources, restructuring or reorganizing of staff resources in order to effectively manage workloads and constant changes imposed as a result of changes in strategic priorities or the addition of new external award competitions.
  - Providing annual performance appraisals
- Understands the needs of graduate students and working with academic and support units to investigate and propose new initiatives and be innovative in the creation of new award opportunities to propel Waterloo as a leader amongst our peer institutions.

- Monitors and assesses existing award programs to determine if adjustments to regulations are required.
- Consults with agencies and Associate Vice-President or Assistant Vice-Presidents Graduate Studies and Postdoctoral Affairs on award exceptions and the preparation of appeals and recommendations.
- Works closely with the Associate VP and Assistant VPs GSPA on all matters related to funding development strategies and academic decisions.
- Provides statistics to senior administration in order to support future planning and decision-making.
- Represents the Associate VP and Assistant VPs GSPA and the Director, Graduate Academic Services on committees where appropriate.
- Member of the Board of Directors for the Graduate Student Endowment Fund (GSEF) committee.
- Responsible for offering services to students, staff and faculty members in the capacity of Commissioner for Taking Affidavits.

### **Management of Award Administration**

- Oversees internal and external awards and scholarships administration including the dissemination and advertising of funding regulations and application instructions to and for current and prospective graduate students, postdoctoral fellows, department staff, faculty members and senior administration for award programs under his/her management.
- Advises students, postdoctoral fellows, staff and faculty on procedures and eligibility matters to ensure the highest success rate for University of Waterloo applicants in external award program competitions.
- Interprets and evaluates domestic and foreign transcripts using complex and varying grading systems, conversion guides and unique rules for award competitions to determine eligibility of applicants and to support decisions.
- Prepares, reviews and submits applications to appropriate internal committees and external agencies for adjudication as appropriate.
- Liaises with external agency contacts concerning clarification of regulations, providing feedback, and the submission of results/applications as appropriate for further adjudication and reporting for programs under his/her management.
- Communicates results to appropriate stakeholders.

### **Award Development**

- Works closely with the Office of Advancement to write, approve and establish or amend effective award agreements for endowments and trusts.
- Understands and interprets University regulations and government policies as they relate to awards, to ensure acceptable purposes of the award and award criteria, and to ensure they meet the needs of the academic unit, graduate student population and the University, while fulfilling the wishes of the donor.
- Oversees the administration of graduate awards from endowments and trusts including planning program budget entitlements, reviewing and approving all nominations, and annual reporting and communications to university administrators and donors.
- Works with the Associate Vice-President and Assistant Vice-Presidents GSPA and the Graduate Financial Officer on creating new or amending existing award initiatives funded through operating budgets based on strategic priorities.
- Oversees the submission of any new or amended scholarship and award information to the Secretariat's Office for Senate Graduate & Research Council approval as this information may affect eligibility and selection criteria, and award values.

### **Communications and Outreach**

- Responds to inquiries from current and prospective graduate students, postdoctoral fellows, staff and faculty members.

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- Oversees the creation and updating of awards and scholarship website content as well as internal administrative processes, guidelines and timelines based on the interpretation of rules and guidelines.
- Leads and participates in scholarship information sessions/workshops, graduate student orientation and conferences in order to remain current on application processes and award regulations for external award competitions.
- Collaborates with colleagues from other institutions to allow for business process sharing and professional development.
- Member of the Ontario University Registrars' Association (OURA)

### **Required Qualifications**

#### **Education**

- University bachelor's degree

#### **Experience**

- 5+ years in university environment.
- Comprehensive knowledge of the university and graduate studies environment is required.
- Experience managing graduate and postdoctoral scholarships is preferred and is a strong asset.
- Ability to work both independently and in a collaborative, team-based environment is required.
- Supervisory experience and leadership skills are required.

#### **Knowledge/Skills/Abilities**

- Knowledge of university policies and graduate studies regulations and practices related to graduate financial aid and award programs is strongly preferred.
- Intermediate to advanced skills with Microsoft Office is required – Outlook, Excel, Word, SharePoint.
- Knowledge of and experience with financial aid in PeopleSoft Campus Solutions (Quest) is required.
- Knowledge and experience with document retrieval in Hyland OnBase Document Management is preferred.
- Knowledge of and experience with Finance account and posting attributes is preferred (Unit4).
- Accuracy, attention to detail and strong problem-solving abilities are essential, as is the aptitude for and experience with conducting research and analyzing data.
- Strong work ethic and ability to accomplish tasks independently in a timely manner is required; this position is very much deadline driven and adherence to timelines and deadlines is imperative.
- Ability to multi-task with competing and changing priorities and manage large programs with significant workload and responsibilities is required.
- Excellent written and verbal communication skills are essential; participating/presenting in workshops or information sessions is required.
- Experience and ability with interpreting policies and regulations is required.
- Proven interpersonal skills and willingness to participate in and collaborate with others in academic and administrative units is required.
- The incumbent must demonstrate a professional demeanour when interacting with students, staff and faculty on confidential and sensitive matters.

### **Nature and Scope**

- **Contacts:** Internal: GSPA staff; students; faculty members; other staff in support units across campus, including but not limited to Counselling Services, AccessAbility Services, Human Resources, Student Financial Services, Student Awards & Financial Aid, Office of Advancement, Office of Research, Office of the Vice-President Academic and Provost, and Office of the President.. External: liaison with external agencies for all graduate and postdoctoral award programs administered by the University of Waterloo; Canadian universities.

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- **Level of Responsibility:** Senior manager of the functional operations of the graduate awards team in the unit, works with executive staff members for strategic planning and decision-making, ensures that guidelines and eligibility criteria are met in the review, adjudication and assessment of internal and external award programs. determines the optimal course of action to solve problems and makes recommendations to stakeholders.
  - **Decision-Making Authority:** Makes decisions related to the functional operations of the GSPA awards team and recommends any structural reorganization or human resource matters, works closely with executive staff members to incorporate changes to existing or implement new programs resulting from academic decisions, strategic priorities and university-wide initiatives. The incumbent makes decisions on eligibility matters, the establishment of new or amendments to existing award agreements, and on the most effective methods of operationalizing initiatives.
  - **Physical and Sensory Demands:** Demands typical of an administrative position within an office environment – extensive sitting and concentrated attentive use of one or more senses while doing computer work; dealing with interruptions. Concentrated attention to detail is required in an office environment with competing priorities. The incumbent must be able to manage concurrent assignments and prioritize workloads in order to meet deadlines. Adherence to timelines and deadlines is imperative as is attention to detail and ability to problem solve.
  - **Working Environment:** Travel: minimal. Psychological Risks: The incumbent must be sensitive to the often extreme and prolonged stresses due to volume, deadlines, demands and interruptions (e.g., phone calls, e-mails, student assistance at the front counter and unplanned but urgent support request throughout the day). This role involves interactions with people who may be upset or aggressive (e.g., students who have escalated an issue, staff or faculty upset with a decision). Working Hours: regular working hours; overtime during peak periods may be required.