

## Job Description

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<b>Job Title:</b>	Undergraduate Awards Officer
<b>Department:</b>	Registrar's Office, Student Awards and Financial Aid Office
<b>Reports To:</b>	Manager, Undergraduate Awards
<b>Jobs Reporting:</b>	N/A
<b>Salary Grade:</b>	USG 8/9
<b>Effective Date:</b>	May 2018

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### **Primary Purpose**

The Undergraduate Awards Officer is one of two such positions responsible for the administration of undergraduate scholarship and award programs within a faculty portfolio including financial management, selections, payments, communications, and reporting. They make decisions on award recipients and facilitate selections for entrance and upper-year awards, ensuring compliance with specific criteria, policies, and guidelines. They work collaboratively with advancement teams in the development of new award agreements and in support of donor relations and stewardship projects. The incumbent is an important resource to faculty and staff on awards-related matters, providing expertise and advice on policies and processes, as well as support for Faculty-funded award programs and initiatives.

### **Key Accountabilities**

#### **Undergraduate Scholarship and Award Programs**

- Responsible for the administration of all entrance and upper-year scholarships and award programs within their portfolio including those supported by donors, University funds, as well as external award programs as applicable.
- Responsible for setting priorities and effectively managing awards in order to meet critical deadlines related to various faculty, departmental, admission, and records processes and initiatives.
- Accountable for decisions on donor-funded award programs, ensuring compliance with specific award criteria, general award guidelines, as well as University and government policies.
- Responsible for assessing award applications, analyzing candidate reports, selecting recipients, or for submitting eligible candidates to appropriate internal committees for adjudication.
- Effectively promotes award opportunities with a view to enhancing application rates and ensuring that all available donor-supported award funds are issued to deserving students on an annual basis.
- Responsible for notifying donors of their recipients and/or for facilitating communication by faculty advancement teams, where applicable.
- Responsible for the monitoring and assessment of existing award programs to determine if adjustments to criteria and/or business processes are required.
- Oversees activities related to the processing of award payments and communications.
- Applies comprehensive job knowledge to resolve issues related to award eligibility, payments, application procedures, renewals, etc.
- Advises students, staff, faculty, etc., on eligibility requirements of undergraduate awards.
- Supports Faculty award initiatives and events by providing reports, research, data analysis, guidance, etc.
- Works with the Manager, Undergraduate Awards in reviewing current award processes to improve the experience for students and departments.

### **Financial Management of Undergraduate Scholarships and Awards**

- Responsible for the annual planning and reconciliation of award program budgets and entitlements, for both trusts and endowments.
- Reviews potential income of endowment funds and determines appropriate value to award from each fund.
- Collaborates with other units (e.g., Graduate Studies & Postdoctoral Affairs, Office of Advancement, Faculties, etc.) when interdisciplinary or Faculty funding is involved.
- Responsible for reporting available funding to faculties, departments, etc., as appropriate.
- Analyzes financial expense and student data reports to facilitate reconciliation and forecasting activities.
- Identifies and resolves issues related to funding shortfalls, resource adjustments, etc.

### **Award Development Activities and Approval of Gift Agreements**

- Provides experience-based as well as evidence-based advice to Development and Advancement staff as they prepare gift agreements for new and amended undergraduate awards to ensure they meet the needs of the donor, undergraduate students, and academic unit as well as UW priorities, CRA guidelines, human rights guidelines, and other administrative requirements.
- Collaborates with Development Officers to find a positive outcome to complex or unmanageable donor requests.
- Analyzes existing award opportunities and advises on areas of need.
- Reviews gift agreements for consistency, clarity, and manageability, as well as for adherence to internal policies and external requirements.
- Responsible for signing authority, on behalf of SAFA, for any new or amended gift agreements (Appendix A: Terms and Conditions) within their portfolio.
- Responds to urgent requests from Development/Advancement staff requiring context and guidance on existing award programs to facilitate donor relations.
- Provides on-demand reporting in support of donor stewardship projects.
- Provides awards-related training to Faculty Advancement teams as required.

### **Systems-related Activities**

- Creates, maintains, and runs various set-up tables and processes within the Financial Aid module of the PeopleSoft student administration system to facilitate the administration, communication, and payment of awards.
- Participates as a member of the user analyst team, providing input to the design, testing, upgrades, and implementation of systems-supporting functions related to undergraduate awards.
- Produces and analyzes reports using PeopleTool Query functionality to facilitate selection, review, and reporting of award candidates and recipients.
- Prepares and delivers bulk email communications.
- Participates in the development and execution of other systems and on-line processes related to award applications, data management, reporting tools, etc.

### **Client Relationships and Outreach**

- Builds and maintains effective working relationships with faculty and staff within their Faculty portfolio, within the Registrar's Office, Advancement, Development, and across campus, providing expert advice on awards-related inquiries, initiatives, processes, issues, etc.
- Represents SAFA on various committees, information sessions, and at special events.
- Participates in Faculty award events, networking with donors, students, faculty, etc.
- Prepares and presents scholarship and award information to student groups on request.
- Participates in various recruitment and outreach events such as Ontario Universities Fair, Fall Open House, You@Waterloo Day, etc.

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*\*All employees of the University are expected to follow University and departmental health and safety policy, procedures and work practices at all times. Employees are also responsible for the completion of all health and safety training, as assigned. Employees with staff supervision and/or management responsibilities will ensure that assigned staff abide by the above, and actively identify, assess and correct health and safety hazards, as required.*

### **Required Qualifications**

<b>Education</b> <ul style="list-style-type: none"><li>• University degree or equivalent combination of education and work experience</li></ul>
<b>Experience</b> <ul style="list-style-type: none"><li>• 5 years of experience within the postsecondary sector, or similar environment, preferably in a Registrar's office and/or financial aid environment.</li><li>• Experience interpreting policies and procedures related to admission, records, and/or financial aid preferred.</li><li>• Experience working with PeopleSoft Student Information System preferred.</li><li>• Experience working with Unit4 or other financial system preferred.</li></ul>
<b>Knowledge/Skills/Abilities</b> <ul style="list-style-type: none"><li>• Excellent communication skills, both written and oral, for a varied audience.</li><li>• Strong organizational skills and demonstrated initiative coupled with the ability to handle multiple tasks, meet deadlines, and excel in a fast-paced environment characterized by changing priorities.</li><li>• Ability to work independently and as part of a team.</li><li>• Demonstrated analytical and problem solving skills.</li><li>• Proven aptitude for accuracy, attention to detail, and editing skills.</li><li>• Proven ability to deal with difficult or sensitive situations with tact and diplomacy.</li><li>• Advanced skills with Word and Excel and intermediate skills with PowerPoint.</li></ul>

### **Nature and Scope**

- **Contacts:** Internally, collaborates with management and support staff within the Offices of the Registrar, Finance, Advancement, Graduate Studies and Postdoctoral Affairs, Student Success, Information Systems and Technology, and other departments across campus; as well as with Associate Deans, Chairs, Associate Chairs, Financial Officers, Faculty admission teams, undergraduate advisors, and other management and support staff within Faculties. Externally, responds to inquiries and provides information and advice to a wide variety of audiences including students, parents, high school guidance counselors, award donors, external award agencies, and other post-secondary institutions.
- **Level of Responsibility:** This job involves defined duties and responsibilities as well as specialized work and the incumbent is responsible for managing workload with minimal supervision. They are responsible for ensuring that guidelines and eligibility criteria are met in the review and selection of donor-supported award programs and University scholarship programs. They are accountable for the effective management of the resources made available through endowment and annual donations. The incumbent has no direct reports but participates in the coaching/training of the Undergraduate Awards Co-ordinator and the Undergraduate Awards Assistant. In absence of the Manager, Undergraduate Awards Officer, ensures that weekly award processes and tasks are completed.
- **Decision-Making Authority:** The Undergraduate Awards Officer makes decisions on award applications and programs for which they are responsible by weighing several factors including eligibility criteria, policies, and guidelines, as well as applying sound judgement. They provide specialized knowledge and guidance to advancement teams in the development of new award agreements. Manages workload including personal interactions and collaboration, work flow and

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time management, consultation, and other key accountabilities; determines the optimal course of action to solve problems and to exert a positive influence on other stakeholders; and is accountable for binding decisions on behalf of the university.

- **Physical and Sensory Demands:** Minimal demands typical of a position operating within an office environment; periods of extensive sitting and concentrated use of visual senses.
- **Working Environment:** Regular working hours, some evening/weekend work required. Attends recruitment events on campus and in Toronto.