

Job Description

Job Title:	Associate Director, Student Awards & Financial Aid
Department:	Registrar's Office
Reports To:	Director, Student Awards & Financial Aid
Jobs Reporting:	Financial Aid Specialists (5), SAFA Operations Specialists (3)
Salary Grade:	USG 11
Effective Date:	November 2023

Primary Purpose

The Associate Director, Student Awards and Financial Aid is responsible for the functional direction and implementation of tasks and responsibilities of the Financial Aid Specialists and Operations Specialists. This role oversees a high volume of work and ensures the team works effectively, and efficiently. A key accountability in this role is providing effective direction, strong leadership, and development of the team.

This position works closely with the Assistant Director, Financial Aid Process and Policy and the SAFA Systems Solutions Architect to ensure continuous and collaborative support between the operations and systems units. This position provides backup to the Director, Student Awards and Financial Aid and acts as Director in their absence.

Key Accountabilities

Decision Making

- Leads resolution of complex problems acting as a resource for inquiries and issues within team as well as for other departments such as Student Financial Services and the Centre.
- Reviews appeals and special case conditions.
- Apply sound judgement and comprehensive job knowledge to solve complex problems related to financial aid processing.
- Makes decisions by weighing several factors, some of which are partially defined and entail missing pieces of critical information.
- Assist the Director in assessing the impact of policy changes on the SAFA Office and the university at large and must plan and coordinate the implementation of revised policies and procedures in the SAFA office.
- Apply comprehensive job knowledge related to OSAP policies and procedures to ensure applications are complete and accurate.
- Keep up to date with program and policy changes to the OSAP program as well as other provincial and territorial student aid programs.
- Stay abreast of current research, philosophies and practices related to post-secondary financial aid programs to evaluate their relevance.

Team Leadership

- Direct and coordinate a wide range of activities related to SAFA operations, ensuring adequate resourcing to meet key calendar and deadline dates.
- Monitor coding principles to maintain accurate records and efficient processes.
- Ensure the quality and accuracy of the Operations team's production work.
- Facilitate effective internal communication and team building with the result that SAFA staff are flexible and adept at dealing with the heavy workload and constant change
- Assist in the design of the organizational structure for the SAFA office. This includes the effective recruitment of staff and their orientation, training, performance evaluations, cross training, and ongoing professional development.
- Sets daily and weekly priorities, creates teams' schedules, manages escalated inquiries, and monitors workloads
- Monitor workflow and workloads and implement changes to create efficiencies

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- Coordinates the flow of activities between each team that takes into consideration conflicting priorities for both teams individually and as a group
- Create and provide onboarding training for the Center's Student Service Specialists related to Student Awards & Financial Aid content. Identify ongoing training needs for Center's Student Service Specialists.
- Hires, trains, and supervises direct reports as well as Work Study and Work Placement student hires. Complete student work term evaluations
- Encouraging staff participation in personal and professional development on an on-going basis

Financial Aid Administration

- Ensures that all policies and procedures are interpreted correctly, executed efficiently and that UW student needs are satisfied.
- Sets the limits of discretion that can be exercised at various levels within the SAFA Office and ensures that exceptions are adequately documented and consistently fair.
- Ensures that high record keeping standards are created and always maintained. Accountable for the maintenance of procedures and record keeping within their portfolio. This includes archiving documentation as required by MCU following their policies and procedures.
- Review business processes and coding practices and seek continuous improvement and enhancements to improve service to students, staff, and faculty.
- Steward for OSAP access as an OSAP Local Registration Authority (LRA). Set up and remove user access as well as complete access audits to MCU.
- Out of Province Super User to set up and remove users on the team. Provide backup for the FAS team for out of province processing.
- Will aid with US Funding program, Micro-credentials, emergency loans, Student Academic Progress (SAP), OSAP appeals, OSAP editing.

Production support

- Oversee data management processes to ensure integrity of data
- Accountable for the accuracy of data and support for team throughout the day to day operations
- Support and guide process automation and technological enhancements from SAFA Operations Specialists recommendations
- Provide support for complex tasks and operations work
- Coordinate processing with GSPA as needed
- Establish and monitor appropriate metrics for the team's work to support continuous improvement

Communication and Customer Service and Outreach

- Represents the University of Waterloo at various recruitment events both on campus and at the University Fair
- Develop and present informative financial aid related sessions/presentation to prospective and current students, parents, and others either on campus or off campus as requested.
- Provide individual financial aid counselling in appointments to provide students and/or their families with information and advice.
- Responsible for creating and maintaining financial literacy initiatives for students.
- Sets the tone for fair and compassionate oversight of appeals and exceptions.

**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

Education

- University degree or suitable combination of education and experience in a post-secondary environment

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Experience

- 3-5 years of strong managerial experience and leadership skills dealing with diverse teams and situations.
- 3-5 experience in financial aid administration or in a financial environment
- Experience working in a fast-paced service-oriented role with demonstrated success in resolving challenging customer service issue preferably in a post-secondary student service environment
- High degree of planning and coordination skills.
- Understanding of issues and trends affecting post-secondary education.
- Proven ability to deal with difficult or sensitive situations with tact and diplomacy.
- Strong organizational, interpersonal, and analytical abilities.
- Experience interpreting complex policies.

Knowledge/Skills/Abilities

- Excellent communication skills, both written and oral, for varied audience
- Strong organizational and problem-solving skills with the ability to manage multiple tasks, meet deadlines, and excel in a fast-paced environment.
- Demonstrated ability to thrive in and contribute to an integrated and collaborative team environment.
- Flexibility, diplomacy, sound judgment, and relationship management skills.
- Knowledge of university structure, policies, and procedures related to the maintenance of undergraduate student records.
- Proficiency in student administration software, preferably PeopleSoft Campus Solutions, and Microsoft Office suite of software
- Exceptional customer service focus, attention to detail, and problem-solving skills.
- Good understanding of relevant legislative and compliance requirements (e.g., FIPPA, AODA) an asset
- Demonstrated ability to manage concurrent projects involving shifting deadlines and priorities
- A continuous improvement mindset and an exceptional customer service focus are critical for success along with exceptionally strong attention to detail and problem-solving skills.

Nature and Scope

- **Contacts:** This position is one of three management positions reporting directly to the Director, Student Awards & Financial Aid - the Assistant Director, Financial Aid Process and Policy and the Manager, Undergrad Awards. Must maintain a productive working relationship with managers and staff in the Registrar's Office, Deans and Associate Deans, College Heads, Cooperative Education and Career Action, numerous Faculty and College based personnel who deal with financial aid, scholarships and customer service matters, and managers and department heads in other administrative departments. Must also work effectively with the senior managers at other Ontario Universities and the Ministry of Colleges and Universities.
- **Level of Responsibility:** This position is responsible and accountable for the results of the Student Awards & Financial Aid unit. Directs the work and provides day to day management of a team of SAFA Operations Specialists and Financial Aid Specialists. Demonstrated ability to manage multiple concurrent projects involving shifting deadlines and priorities. Excellent aptitude for detail where accuracy is critical. Proven analytical skills, intuitive thinking, and problem-solving skills. Demonstrated project initiative and leadership to support a continuous improvement culture.
- **Decision-Making Authority:** Accountable for decisions related to the operation of services related to financial aid. Makes decisions on atypical scenarios and issues by weighing several factors, including financial aid policy and guidelines, some of which are partially defined and entail analytical and problem solving abilities. Works directly with the Director, Student Awards & Financial Aid to address necessary changes resulting from strategic plans, academic decisions, university-wide initiatives, and government legislation.
- **Physical and Sensory Demands:** Minimal demands typical of an administrative position within an office environment
- **Working Environment:** Travel – Minimal; Working Hours – Regular working hours, some evening/weekend work required; Risk – physical and psychological – This role involves moderate psychological risk resulting from unavoidable exposure to hazardous, disagreeable, or uncomfortable environmental conditions. This role may involve interactions with people who are upset, aggressive, unstable or unpredictable (e.g. students or parents)

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who have escalated an issue, staff or faculty upset with a decision), irregular and/or high volumes, multiple and/or tight deadlines beyond one's control, and interruptions (e.g. phone calls, e-mails and unplanned but urgent support requests at different times of year).