

**HUMAN RESOURCES
SIMON FRASER UNIVERSITY**

ADMINISTRATIVE & PROFESSIONAL
JOB DESCRIPTION

(NOTE: This is a Temporary Full-time Position)

<https://trr.tbe.taleo.net/trr01/ats/careers/v2/viewRequisition?org=SIMOFRAS&cws=37&rid=700>

Position Number: 101897

A. IDENTIFICATION

Position Title:	Student Aid Officer
Department:	Financial Aid and Awards – Student Services
Position Reports To (Title):	Associate Director, Financial Aid and Awards
Date:	April 3, 2014

B. POSITION SUMMARY

Briefly describe the primary function and purpose of the position in one or two sentences.

Provides guidance and advice to financial aid staff and students in the interpretation and application of difficult financial aid criteria, policies, and procedures; approves and/or adjudicates student loans and grants; assesses applications for SFU administered financial aid and award programs and approves need based funding; coaches individual students in the development of financial action plans; develops and delivers financial education programs for students, parents, staff and the general public; conducts basic needs assessments and makes referrals to external agencies and internal resources.

C. DUTIES AND RESPONSIBILITIES

Starting with those you consider the most important, list and describe the main duties and responsibilities of the position. For each item start with an action verb and briefly describe WHAT is done, HOW it is done and WHY it is done. Indicate in the right hand column the percentage of time spent on each particular task.

Description

Provides guidance and advice to financial aid staff and students in the interpretation and application of difficult financial aid criteria, policies, and procedures; the development of complex financial action plans and needs assessment reports; and sourcing, compilation and evaluation of defensible justifications based on interpretive reasoning and past practice to assist with financial aid applications, reassessments and appeals that maximize success.

Approves and/or adjudicates student loans and grants by assessing eligibility to criteria, policies, and procedures and past practice.

Assesses applications for SFU administered financial aid and award programs and approves need based funding; identifies and recommends merit based award recipients to Senate Committees.

Coaches individual students in the development of financial action plans by assisting students with the development of strategies to plan for and fund their education and/or to repay their student loans after completion of their studies.

In consultation with supervisor, develops and delivers financial education programs for students (e.g. budgeting workshops and financial planning workshops, etc.), financial aid and award education programs for parents and the general public (e.g. Post-secondary financing for parents), and financial education training programs for staff at all SFU campuses.

Coordinates the design and delivery of web and print based student aid information and education materials by writing, editing and proofing content and working closely with the supervisor and staff in Student Services Communications.

Advises students on the different policies and procedures governing eligibility and application for a wide variety of university and provincial, federal and U.S. government financial assistance programs including scholarships, bursaries,

awards and work study by responding to inquiries, and meeting individually with students to develop effective application strategies.

Coordinates financial aid programs relating to Foreign Exchange programs, Field Schools and SFU external program sites by liaising with International Services for Students staff to determine programs costs and structure, evaluate costs based on government student financial aid and award policy and eligibility criteria, advising students on eligibility and procedures, liaising with site coordinators, and conducting information workshops to ensure students are apprised of government and institutional program requirements prior to departing for exchanges and/or field schools.

Advises students of on-campus and off-campus resources to support their successful participation in university studies by conducting basic needs assessments and making referrals to agencies and organizations external to the University and university departments such as the Centre for Students with Disabilities, Health & Counseling, Career Services, and International Services for Students.

Resolves complex or problematic student issues relating to financial aid programs by interpreting relevant policies and procedures, liaising with internal staff and external service, agency, and government staff.

Advises international students regarding financial aid programs and liaises with International Services for Students staff with regard to special cases and aid program availability.

Coordinates and manages the electronic transfer of confidential student loan and registration records between government agencies and the University by ensuring the data is accurate and liaising with agency, office and University information technology staff to evaluate and resolve problems.

Participates on provincial committees to provide professional input in the development and delivery of student aid, review academic programs and out-of-province government funding eligibility, and liaises with University academic department staff to provide information regarding program initiatives and changes to keep them informed.

Gathers and analyzes statistical information for financial aid and award programs as part of annual reporting to the University Senate and on a quarterly and ad hoc basis for management information requirements.

D. DECISION MAKING

i) Give some typical examples of the most important decisions the incumbent is expected to make in carrying out the duties and responsibilities of the position. To what extent can the incumbent rely on established policies or advice from others in making these decisions?

Makes non precedent setting decisions regarding need based financial aid and appeals and waivers; the design of budget and financial training workshops; how to advise students to maximize need based funding and merit based award opportunities; how to coach students in the development of sustainable financial plans; the applicability and application of appropriate policies and procedures to individual situations; and how to communicate unfavorable decisions to students.

ii) Give some examples of the types of decisions the incumbent would refer to his/her supervisor.

Contentious, precedent setting, and unusual appeals and waivers; and the final approval on the design of budget and financial training workshops.

E. SUPERVISION EXERCISED

Indicate the number of continuing employees for whom the position is responsible.

Number of continuing employees reporting directly to the position: 0

Total number of continuing employees for whom the position has direct responsibility: 0

F. SUPERVISION RECEIVED

Describe the extent to which the supervisor determines the day to day work load of the position and assists in the completion of duties. Explain the nature of guidance received and how often work is checked or reviewed.

Works under general supervision.

G. UNUSUAL WORKING CONDITIONS

From time to time, the incumbent is required to explain University and Government policies unfavorable to students, as well as explain decisions resulting from the application of University and Government regulations and from Committee decisions.

The incumbent must be prepared for a variety of circumstances to occur from time to time as a result of the personal interviews conducted with students. Sensitive situations call for the use of diplomacy, tact, sensitivity and firmness in the delivery of information and explanations.

Primary work location is the Burnaby campus and work is also conducted at the Surrey and Vancouver campuses. Some evening work may be required.

H. ENTRANCE QUALIFICATIONS

What combination of experience, training and/or formal education do you believe is the minimum required to perform the duties of this position?

Bachelor's degree and three years of related experience which includes direct experience in Financial Aid and Awards or Student Services or an equivalent combination of education, training and experience.

Excellent organizational, communication (oral and written), presentation, analytical, and problem-solving skills.
Excellent financial administration skills.

Skilled in the design and delivery of workshops.

Ability to use standard office applications (e.g., Filemaker, Excel, Word, Powerpoint) and enterprise level information systems (e.g., PeopleSoft, Banner).

Ability to interpret and apply policies.

Ability to arrange suitable transportation to various work locations.

I. ORGANIZATIONAL RELATIONSHIPS

Indicate in the appropriate blocks the title of the position to which this position reports and the titles of positions reporting directly to it. If more detail is required, add additional blocks.

