



BCGEU POSITION DESCRIPTION

POSITION TITLE: Financial Aid Advisor

JOB NUMBER: 132

REPORTS TO: Manager, Student Awards & Financial Assistance

DEPARTMENT: Student Affairs

DATE CREATED: October 2015

JOB CLASS: 13

DATE REVISED: November 2019

PRIMARY FUNCTION

The Financial Aid Advisors in Student Awards & Financial Assistance is responsible for engaging in collaborative practice to support student success by reducing financial barriers. Through financial counselling, advice, and advocacy, Financial Aid Advisors empower students to confidently plan and navigate their university expenses and achieve their educational goals.

JOB DUTIES AND TASKS

1. Adjudicates and disburses University and government funding

- a. Using independent judgment, approves financial aid funding to students including emergency bursaries, loans, and other financial assistance programs
- b. Adjudicates and authorizes the disbursement of the Adult Upgrading Grant (AUG) on behalf of the Ministry of Advanced Education
- c. Exercises a high level of judgment in advising students and determining eligibility for funding, and disbursing funding. Errors in judgment can result in detrimental student experience, including inability to progress, and significant financial impacts to students and KPU
- d. Interprets internal and external policies related to the authorization and disbursement of student financial assistances
- e. Identifies and recommends a variety of programs (loans, grants, scholarships, etc.) to recommend for individual students, given their unique situations
- f. Assesses student eligibility for the Work-Study Program
- g. Confirms government program student loan and grant eligibility to StudentAid BC, National Student Loan Centre, and other provincial government programs, by completing the Ministry Institutional Appendix, outlining all eligible programs and applicable costs

2. Provides proactive and ongoing support to a caseload of students

- a. Independently conducts interviews with students with financial barriers to collect financial information
- b. Collects and analyzes relevant information, including finances, academic progress, past post-secondary experiences, disabilities, family situation, and future plans
- c. Researches individual students' past loan and grant histories to gain a full understanding of possible options
- d. Prepares case notes of student interviews, meetings, and decision-making
- e. Advises students on different policies and procedures governing eligibility and application for a wide variety of KPU and provincial, federal, and US government financial assistance programs.
- f. Coaches individual students on developing financial action plans to fund their education and/or repay loans after completion of their studies, including advising students on default prevention
- g. Investigates and resolves complex or problematic funding issues, including liaising with other members of the Financial Aid community and the provincial, federal, and US governments.
- h. When appropriate, recommends outside government funding through organizations such as WorkBC or Ministry of Social Development.



- i. Advocates within KPU on students' behalfs as required
- 3. Manages, promotes, and reports on various funding programs**
 - a. Assumes leadership roles in specific programs, such as the Former Youth in Care Program, Hamper Program, US Loans Program, and Work Study
 - b. Presents to groups of students on financial literacy debt management, financial aid options, and application processes
 - c. Interviews, and assesses in depth audits of students who have applied for KPU funding and makes decisions on whether students are eligible for funding.
 - 4. Engages in collaborative practice within KPU and provincial and federal associations**
 - a. Assists in hiring, training, and mentorship to new Financial Aid Advisors, Financial Aid Assistants, and other advisors and staff across service departments at KPU.
 - b. Intervenes with students who are angry, hostile, or upset. Diffuses the situation, assisting where possible and referring to appropriate resources
 - c. Advises the campus community on financial services, scholarships, and programming as it relates to SAFA to increase service to low income or financially insecure students.
 - d. Liaises with various student services and external bodies to provide holistic support and individualized service to targeted student populations including, but not limited to, first-year students, Indigenous students, at-risk student, students with disabilities, and first-generation students.
 - e. Investigates funding issues between KPU and outside institutions (including the provincial and federal governments), consult with, and provide advice to the appropriate internal and external departments.
 - f. Establishes, liaises, advocates, and builds rapport with high school and school district representatives, post-secondary institutions, employers, professional groups and other related agencies to support students transitioning to post-secondary.
 - g. Responds to enquiries from the general public, high schools and prospective students, and provide information, guidance and advice regarding KPU programs, services, policies and procedures. Where appropriate, refer to other KPU resources and departments.
 - h. Represents KPU at University and community events, including organizing and executing presentations and information sessions. Occasionally lift and move items weighing up to 20 – 40 lbs.
 - i. Utilizes tact, discretion and persuasion to address and amend policies and procedures that may negatively impact students.
 - 5. Related duties**
 - a. Provides back-up support to SAFA frontlines
 - b. Gathers, maintains, and provides statistics to the Manager, Academic Advising on various initiatives and practices.
 - c. Selects, orders, organizes and stores resources and reference materials.
 - d. Independently manages a complex schedule of appointments while ensuring that critical and conflicting deadlines are met.
 - e. Regularly updates processes and procedures and documents these updates
 - f. Analyzes, tests, trains, and implements new Banner functionality and upgrades
 - g. Contributes to and promotes a safe, respectful, and inclusive work environment by adhering to University policies and procedures and completing mandatory training programs.



SUPERVISION RECEIVED: Reports to Manager, Student Awards & Financial Assistance
SUPERVISION/DIRECTION EXERCISED: Trains and mentors new Financial Aid Advisors, Financial Aid Assistants, and other Student Affairs staff.
PHYSICAL ASSETS/INFORMATION MANAGEMENT: Maintains and updates student records in KPU's Student Information System and Ministry of Advanced Education online systems. Maintains SAFA student files and records in accordance with KPU and government policies. Secures cheques, loans, and other sensitive and/or confidential documents. Ensure the security and integrity of personal information contained within government and KPU databases. Researches, develops, and produces content for use in institutional publications. Ensures the security and integrity of personal and/or confidential information.
FINANCIAL RESOURCES: Approves applications for emergency financial loans and bursaries through institutional, government, and donor funds. Receives and secures cheques Administers various award program budgets by monitoring and ensuring expenditures are within set limits
<i>The above statements reflect the general details considered necessary to describe and evaluate the principal functions of the job identified, and shall not be construed as a detailed description of all the work requirements that may be inherent in the job.</i>

EMPLOYER REQUIRED KNOWLEDGE SKILLS AND ABILITIES:

- Must possess a bachelor's degree in a relevant discipline.
- A minimum of 3 years' previous experience working directly with students in an advising capacity in a post-secondary student services setting.
- Demonstrated experience working with student awards and financial assistance programs inclusive of government student loans and grants.
- Excellent interpersonal, written and oral communication skills.
- Must possess strong public speaking and presentation skills.
- Demonstrated customer service experience in a fast-paced complex setting dealing with sensitive situations calling for the use of empathy, diplomacy and tact in the delivery of information.
- Superior time management, problem-solving, organizational skills. Must be able to work under pressure.
- Demonstrated ability to maintain statistical records.
- Demonstrated ability to handle confidential information appropriately.
- Demonstrated ability to work independently, exercise good judgment demonstrate initiative, and meet deadlines.
- Demonstrated ability to recognize, analyze and resolve problems.
- Ability to establish and maintain effective working relationships with University administration, faculty, staff and students.
- Ability to communicate patiently and effectively with diverse ranges of people including the ability to deal effectively with difficult, hostile or upset clients.
- Demonstrated working knowledge of the Student Banner system, or a similar student records system (e.g. Colleague, PeopleSoft).
- Proficiency with Microsoft Word, Access and Excel at an intermediate level.