**M5: Level Standards**

**GENERAL ROLE**

This level is the first with the primary function of managing employees. Incumbents may initiate and communicate a variety of staffing actions.

Oversees the day-to-day operations of a group of employees. Responsible for training and development of subordinate staff, estimating staffing needs, assigning work, meeting completion dates, and interpreting and ensuring consistent application of organizational policies. Positions at this level do not exclusively serve as the supervisory level to only student employees.

Incumbents:

* Alter the order in which work or a procedure is performed.
* Recommend or implement modifications to practices and procedures to improve efficiency and quality, directly affecting the specific office operation or departmental procedure.
* Distribute work and monitor workload among staff.

**INDEPENDENCE AND DECISION-MAKING**

*🡪 Supervision Receive*d

* Works under direction.
* Seeks approvals when significant changes to process steps are considered and additional resources for task completion are required.

*🡪 Context of Decisions*

* Decisions are driven by office/departmental policy and procedures.

*🡪 Job Controls*

* Free to plan and carry out all phases of work assignments, including the oversight of staff.
* Has the latitude to make daily operational decisions.

**COMPLEXITY AND PROBLEM SOLVING**

*🡪 Range of issues*

* Issues tend to be operational in nature.

*🡪 Course of Resolution*

* Identifies issues and gathers facts.

Understands the smallest details of an assigned area.

*🡪 Measure of Creativity*

* Problems can be resolved within provided guidelines.
* Problems are not amenable to strict technical resolution, requiring innovative thinking.

**COMMUNICATION EXPECTATIONS**

*🡪 Manner of Delivery and Content*

* Diplomatically and effectively deliver information difficult to understand or in contrast with a student or customer's views.

**SCOPE AND MEASURABLE EFFECT**

Incumbents:

* + Manage a small homogenous department.

OR

* Manage a larger process-oriented area whose members perform like activities.
* Actions regularly affect a department or a project outcome with office/programmatic impact.
* Actions generally have a direct impact on controlling such things as staff size and nature of work and scope of services.
* Performance results tend to relate to efficiency, fiscal practices and standing, quality/continuous improvement, timeliness, resource allocation/effectiveness, etc.

**Job Template**

**GENERAL SUMMARY**

Administers the financial aid services for a campus or school of the University.

**REPORTING RELATIONSHIPS AND TEAMWORK**

Works under direction of a manager. Manages the day-to-day operations and a group of employees.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

*The intent of this section is to list the primary, fundamental responsibilities of the job – that is, the duties that are central and vital to the role.*

* Supervises the work of assigned personnel, including providing support, guidance, and feedback related to job duties and performance.
* Prepares, manages, and responds to auditor requests related to institutional, state, and federal compliance audits.
* Plans, develops, evaluates, interprets, and enforces policies, procedures, goals, and objectives for the program and operation in assigned area of responsibility.
* Ensures completion of accurate and timely federal, national, university, and state reports and surveys. Conducts quality assurance review of all reports, surveys, and responses to data requests.
* Oversees financial aid budget development, analysis, expenditure monitoring, and reporting.
* Develops and implements strategies related to financial aid awarding in an effort to meet University targets for enrollment, retention, and graduation.
* Serves as primary point person to evaluate, interpret, and implement policies and procedures in compliance with federal regulations.
* Assist with overall administration of the department.
* Creates and conducts training workshops for staff.
* Performs related work as required.

**MINIMUM QUALIFICATIONS**

* Bachelor’s degree in related field.
* Five to six years of related experience.

**COMPETENCIES**

**Knowledge of:**

* Federal and state financial aid regulations
* Student information systems
* Principles and practices of employee supervision
* Current news and trends in higher education
* Microsoft Office and related software applications

**Skill in:**

* Planning and organization
* Collaboration
* Developing and maintaining effective and appropriate working relationships
* Critical thinking, problem solving, and analysis

**Ability to:**

* Review and analyze data to identify trends and initial improvements
* Communicate effectively through both oral and written means
* Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
* Assemble and organize data and prepare reports
* Maintain the confidentiality of information and professional boundaries
* Work independently to analyze available information, draw conclusions and understandings, and present such conclusions effectively to senior management