



Student Services Job Family: **Financial Aid Progression**

These generic job title summaries are intended to indicate the kinds of tasks and levels of work complexity that will be required of positions classified to any of these titles and are not intended to be construed as declaring the specific duties and responsibilities of any particular position. The use of particular expressions or illustrations describing functions within a specific job title does not exclude other duties of a similar kind and/or level of complexity. Positions are classified to a particular job title based upon the predominant level of expected work complexity. ***A position that is classified into this title and band must meet the Cornell requirements for exemption under the FLSA***

GENERIC JOB PROFILE SUMMARIES

Financial Aid Associate I INDIVIDUAL CONTRIBUTOR	Financial Aid Associate II INDIVIDUAL CONTRIBUTOR	Financial Aid Associate III INDIVIDUAL CONTRIBUTOR	Manager Financial Aid MANAGEMENT	Director Financial Aid MANAGEMENT	Senior Director Financial Aid MANAGEMENT
Evaluate and analyze financial information submitted by applicants to determine eligibility for financial assistance and determine type and amount of aid to be awarded in accordance with established federal and University standards and guidelines.	Evaluate and analyze financial information submitted by applicants and the determination of type and amount of aid to be awarded; determine any change to award if necessary.	Plan and oversee financial aid application process; interface effectively with faculty, senior school administration, other financial aid office professionals, and current/ prospective students regarding office and application procedures.	Oversee financial aid application process; interface effectively with faculty, senior school administration, other financial aid office professionals, and current/ prospective students regarding office and application procedures.	Direct and approve the determination of type and amount of aid to be awarded to applicant.	Direct and approve the overall funds to be awarded.
Advise and counsel current students and prospective students and parents on financial aid eligibility for all programs.	Advise and counsel current students and prospective students and parents on financial aid eligibility for all programs; counsel students on solutions to educational financing problems; respond to families changes in circumstances.	Serve as principal counselor for applicants about financing options and for current students about general financial matters including budgeting and debt-management counseling.	May counsel and advise current and prospective students; responsible for more difficult situations.	May counsel and advise current and prospective students; responsible for more difficult situations.	

Financial Aid Associate I INDIVIDUAL CONTRIBUTOR	Financial Aid Associate II INDIVIDUAL CONTRIBUTOR	Financial Aid Associate III INDIVIDUAL CONTRIBUTOR	Manager Financial Aid MANAGEMENT	Director Financial Aid MANAGEMENT	Senior Director Financial Aid MANAGEMENT
Advise and correspond with students and parents on matters pertaining to financial aid/student employment/ loan indebtedness/ bursar and registrar information.	Advise and correspond with students and parents on matters pertaining to financial aid/student employment/ loan indebtedness/ bursar and registrar information.	Meet and advise applicants and their families regarding resources available to finance education; meet with current students to discuss budgeting issues and to consider and address requests for budget increases/adjustments.	May meet and advise applicants and their families regarding difficult conversations.	May meet and advise applicants and their families regarding difficult conversations.	May meet and advise applicants and their families regarding very difficult conversations with audit implications.
Process and disburse financial aid funds; verify that all documents are received/ processed according to federal and institutional policies and procedures; reconcile monthly alternative student loan accounts.	Responsible for making sure accurate and complete information is received from families to process and disburse funds.	Responsible for making sure accurate and complete information is received from families to process and disburse funds.	Manage the process and disbursement of financial aid funds.	Develop and oversee the process procedures for disbursement; constantly revise and improve processes and procedures for financial aid.	Direct the process improvement procedures for disbursement; constantly revise and improve processes and procedures for financial aid.
			Develop and administer financial aid and scholarship budgets and update and incorporate federal financial aid regulations into institutional policy.	Develop and administer direct financial aid and scholarship budgets and update and incorporate federal financial aid regulations into institutional policy.	Develop and lead financial aid and scholarship budgets and update and incorporate federal financial aid regulations into institutional policy.
Assist with developing and maintaining forms and electronic information related to financial aid policies and procedures.	May develop and maintain forms and electronic information related to financial aid policies and procedures.	Develop marketing plans and electronic information including forms, web and social media related to financial aid policies and procedures.	Develop and oversee creation and maintenance of print and electronic information related to financial aid policies and procedures.	Develop and oversee creation and maintenance of print and electronic information related to financial aid policies and procedures.	
Conducts financial aid workshops, including information sessions, federally mandated student loan entrance and exit counseling sessions on financial aid process.	Conducts and may develop financial aid workshops, including information sessions, federally mandated student loan entrance and exit counseling sessions on financial aid process.	Develop and present workshops for current students about debt repayment and financial management best practices.	Plan information programs and promotional events designed to present and promote the school; act as primary representative for alumni and during major recruitment weekends, events such as fairs and forums.	Plan information programs and promotional events designed to present and promote the school; act as primary representative for alumni, trustees and during major recruitment weekends, events such as fairs and forums.	Lead programs and promotional events designed to present and promote the school; primary representative for alumni, trustees and during major recruitment weekends, events such as fairs and forums.

Financial Aid Associate I INDIVIDUAL CONTRIBUTOR	Financial Aid Associate II INDIVIDUAL CONTRIBUTOR	Financial Aid Associate III INDIVIDUAL CONTRIBUTOR	Manager Financial Aid MANAGEMENT	Director Financial Aid MANAGEMENT	Senior Director Financial Aid MANAGEMENT
Perform need analysis calculations to determine aid eligibility for new and returning students; notify students of their financial aid awards and handle financial aid correspondence; adjust aid awards for changes in enrollment, special program enrollment, and for new or different resource amounts.	Responsible for and prepares need analysis calculations to determine aid eligibility for new and returning students; notify students of their financial aid awards and handle financial aid correspondence; adjust aid awards for changes in enrollment, special program enrollment, and for new or different resource amounts.		Oversee student needs-analysis process, calculation of student awards, certification of loans, and budget increase process.	Oversee student needs-analysis process; responsible for forecasting following year award pool.	Direct student needs-analysis process, calculation of student awards, certification of loans, and budget increase process.
Assist in selection and awarding named scholarships; includes updating and monitoring scholarship fund accounts, notifying students and donors of awards.	Assist in selection and awarding named scholarships.	Responsible for strategic planning regarding allocation of multi-million dollar merit and need-based scholarship program.	Responsible for strategic planning and implementation of strategies and plans for meeting financial aid objectives.	Develop and implement strategies and plans for meeting financial aid objectives.	Develop and oversee the implementation of strategies and plans for meeting financial aid objectives.
Participate in the administration of financial aid programs such as federal work-study program.	Coordinate and administer assigned financial aid program such as federal work-study program.	Coordinating and administering student financial aid programs with responsibility for assigned aspects of the operation such as computer operations, publications, scheduling and/or individual or multiple aid programs.	Oversee the coordination and administration of student financial aid programs with responsibility for assigned aspects of the operation such as computer operations, publications, scheduling and/or individual or multiple aid programs.	Oversee the coordination and administration of student financial aid programs with responsibility for assigned aspects of the operation such as computer operations, publications, scheduling and/or individual or multiple aid programs.	Direct the coordination and administration of student financial aid programs with responsibility for all aspects of the operation.
			Develop policies regarding day-to-day operations in the financial aid office.	Develop, evaluate, interpret, implement and/or oversee financial aid policies, procedures and regulations and other policy as it pertains to the functions of the unit.	Advise other financial aid directors on policies and procedures of the University.

Financial Aid Associate I INDIVIDUAL CONTRIBUTOR	Financial Aid Associate II INDIVIDUAL CONTRIBUTOR	Financial Aid Associate III INDIVIDUAL CONTRIBUTOR	Manager Financial Aid MANAGEMENT	Director Financial Aid MANAGEMENT	Senior Director Financial Aid MANAGEMENT
			Hire and supervise staff; oversee and train the financial aid staff to assure that the applications are processed efficiently, accurately, and confidentially, deal with financial aid matters and questions.	Oversee financial aid staff to assure that the applications are processed efficiently, accurately, and confidentially, deal with complex and difficult financial aid matters and questions.	Direct financial aid staff to assure that the applications are processed efficiently, accurately, and confidentially, deal with complex and difficult financial aid matters and questions.
			Responsible for allocation and distribution a portion of the operating budget.	Develop and responsible for allocation and distribution of the operating budget.	

JOB FACTOR PROFILE TABLE

FACTOR PROFILE	11337 FINANCIAL AID ASSOCIATE I, BAND E	11325 FINANCIAL AID ASSOCIATE II, BAND F	11326 FINANCIAL AID ASSOCIATE III, BAND G	11651 MANAGER FINANCIAL AID, BAND G	11328 DIRECTOR FINANCIAL AID, BAND H	11329 SENIOR DIRECTOR FINANCIAL AID, BAND I
MINIMUM EDUCATION AND EXPERIENCE EQUIVALENCY	Bachelor's degree or equivalent; up to 2 years of experience or equivalent	Bachelor's degree or equivalent; 2 but less than 4 years of experience or equivalent	Bachelor's degree or equivalent; 3 but less than 5 years of experience or equivalent	Bachelor's degree or equivalent; 5 but less than 7 years of experience or equivalent	Master's degree or equivalent; 5 but less than 7 years of experience or equivalent	Master's degree or equivalent; 7 but less than 10 years of experience or equivalent
IMPACT	Moderate impact	Moderate impact	Substantial impact	Substantial impact	Substantial impact	Substantial impact
CONTACTS - INSIDE	Assist others Cooperation of task completion	Provide guidance Coordinate activities	Provide guidance Coordinate activities	Provide guidance Coordinate activities	Persuade others to take particular course of action Coordinate major activities	Persuade others to take particular course of action Coordinate major activities
CONTACTS - OUTSIDE	Provide information that exists within pre-established documents and or programs	Provide/receive guidance, advice or information that must be analyzed and developed by the position	Provide/receive guidance, advice or information that must be analyzed and developed by the position	Develop and make presentations and negotiate with others	Develop and make presentations and negotiate with others	Develop and make presentations and negotiate with others
CONTACTS - STUDENTS	Frequent contact dealing with confidential matters	Frequent contact dealing with confidential matters	Frequent contact dealing with confidential matters	Frequent contact dealing with highly sensitive matters	Frequent contact dealing with highly sensitive matters	Frequent contact dealing with highly sensitive matters

FACTOR PROFILE	11337 FINANCIAL AID ASSOCIATE I, BAND E	11325 FINANCIAL AID ASSOCIATE II, BAND F	11326 FINANCIAL AID ASSOCIATE III, BAND G	11651 MANAGER FINANCIAL AID, BAND G	11328 DIRECTOR FINANCIAL AID, BAND H	11329 SENIOR DIRECTOR FINANCIAL AID, BAND I
SUPERVISION	On-the-job training, guidance, advice and advise other employees.	Day-to-day supervisory direction to employees within the department	Day-to-day supervisory direction to employees within the department	Day-to-day supervisory direction to employees within the department	Provide supervisory direction to other supervisors	Supervisory direction to other managers
COMPLEXITY	Occasionally adapt, combine or make improvements in an existing service, product, process or program. Work requires logic and common sense	Frequently adapt, combine or make improvements to services, products, processes or programs. Work requires of reasoning skills and judgment	Occasionally required to develop new, imaginative or innovative solutions, services, products, processes or programs. Work requires sophisticated reasoning skills	Occasionally required to develop new, imaginative or innovative solutions, services, products, processes or programs. Work requires sophisticated reasoning skills	Continually required to develop new, imaginative or innovative solutions, services, products, process or programs. Work requires conceptual and imaginative thinking in a highly complex and uncharted environment	Continually required to develop new, imaginative or innovative solutions, services, products, process or programs. Work requires conceptual and imaginative thinking in a highly complex and uncharted environment
LEVEL OF DECISION MAKING	Responsible for making decisions within prescribed limits and/or providing input to others for decision-making	Responsible for assisting in and influencing decisions concerning policy-setting, research, planning or students	Responsible for assisting in and influencing decisions concerning policy-setting, research, planning or students	Responsible for making decisions concerning policy-setting, research, planning or students	Responsible for making decisions concerning policy-setting, research, planning or students	Responsible for making decisions concerning policy-setting, research, planning or students
FREEDOM OF ACTION	General supervision Some interpretation of established policies and procedures required	General supervision Some interpretation of established policies and procedures required	Very general supervision Interpretation of work policies and procedures, and, at times deviation from standard work practice	Very general supervision Interpretation of work policies and procedures, and, at times deviation from standard work practice	Little direct supervision Considerable latitude for exercising judgment and self direction	Little direct supervision Considerable latitude for exercising judgment and self direction
EFFECT OF DECISION MAKING	Directly affects a functional area Minimal effect on students and employees	Directly affects multiple functional areas Limited effect on students and employees	Directly affects several departments within a college, school or administrative unit Significant effect on students and employees	Directly affects several departments within a college, school or administrative unit Significant effect on students and employees	Directly affects several departments within a college, school or administrative unit Significant effect on students and employees	Directly affects entire college or school administrative unit Critical effect on students or employees

FACTOR PROFILE	11337 FINANCIAL AID ASSOCIATE I, BAND E	11325 FINANCIAL AID ASSOCIATE II, BAND F	11326 FINANCIAL AID ASSOCIATE III, BAND G	11651 MANAGER FINANCIAL AID, BAND G	11328 DIRECTOR FINANCIAL AID, BAND H	11329 SENIOR DIRECTOR FINANCIAL AID, BAND I
WORKING CONDITIONS	Normal working conditions, including no or limited exposure to hazardous conditions/ materials/ equipment. Safety gear may sometimes be required	Normal working conditions, including no or limited exposure to hazardous conditions/ materials/ equipment. Safety gear may sometimes be required	Normal working conditions, including no or limited exposure to hazardous conditions/ materials/ equipment. Safety gear may sometimes be required	Normal working conditions, including no or limited exposure to hazardous conditions/ materials/ equipment. Safety gear may sometimes be required	Normal working conditions, including no or limited exposure to hazardous conditions/ materials/ equipment. Safety gear may sometimes be required	Normal working conditions, including no or limited exposure to hazardous conditions/ materials/ equipment. Safety gear may sometimes be required