#### Trent University LogoOPSEU JOB DESCRIPTION

**Job Title:** Financial Aid Coordinator

**Job Number:** A-296 | VIP: 1406

**Band:** OPSEU- 10

**Department:** Enrolment Services

**Supervisor Title:** Associate Registrar & Director, Service Delivery and Student Financial Support

**Last Reviewed:**  May 17, 2023

#### **Job Purpose:**

Under the supervision of the Associate Registrar & Director, Service Delivery and Student Financial Support, the Financial Aid Coordinator is responsible for coordinating and supervising all Financial Aid programs for Trent University. Financial Aid programs include the Ontario Student Assistance Program (OSAP) and OSAP affiliated programs, the student assistance programs of the federal government and other Canadian provinces and territories, Government sponsored scholarship and bursary programs, student aid for U.S. students, as well as Trent University scholarship, bursary, and award programs. The Financial Aid Coordinator acts as a Financial Aid specialist and ensures adherence to all internal and external regulations. The Financial Aid Coordinator works closely with multiple departments and stakeholders across the university to provide current information and support regarding applicable Financial Aid programs. The incumbent will operate with minimal supervision, wide latitude for independent judgement, and is responsible for a broad range of duties.

This is a multi-incumbent position. The incumbents are expected to have a full understanding of all Financial Aid programs but as the various Financial Aid programs are extensive and complex, it is expected that the incumbents will specialize in either the Funding Programs or the Student Awards section as outlined below. Both incumbents are expected to have a working knowledge of all areas to be able to support and provide back up for one another when needed.

#### Key Activities:

##### Financial Aid Specialist

* Is a Financial Aid specialist and advises staff and clients on all Financial Aid options available to them. Provides support and guidance to students in financial distress.
* Responsible for ensuring that all Financial Aid programs are carried out efficiently and in accordance with internal and external policies, consulting with the Associate Registrar & Director, Service Delivery and Student Financial Support on complex situations and circumstances.
* Responsible for tracking and reporting of Financial Aid data to internal and external stakeholders, including but not limited to the Bursary Recording System.
* Oversee development, schedule, and delivery of all Financial Aid communications for current and prospective students.
* Record and monitor expenditures for all internal and external Financial Aid programs.
* Maintain current knowledge and understanding of external Financial Aid programs to advise and assist internal and external stakeholders, including the training of staff.
* Work with internal and external stakeholders in the administration of Financial Aid solutions for students.
* Provide support and assistance in the development of Trent University policies and procedures related to Financial Aid.
* Review and suggest changes or updates to current departmental policies and processes.
* Participate in groups and events hosted by external organizations to stay current on Financial Aid policy and topics.
* Determine eligibility for the Trent Work Study Program and its variants and provide supporting documentation to eligible students. Provide data and support to Careerspace regarding eligible students and eligibility requirements.
* Maintain current knowledge of interest rates and financial aid landscape for all post-secondary students as well soon to be graduates.
* Coordinate required materials, participate in, and support Associate Registrar & Director, Service Delivery and Student Financial Support during Ministry of Colleges and University (MCU) and Trent University sanctioned audits.

##### Funding Programs

* Oversees the administration of the Ontario Student Assistance Program, including but not limited to full-time funding, part-time funding, micro-credential funding, and interest free status.
* Responsible for maintenance of student files including but not limited to withdrawals, tuition adjustments, courseload changes, etc.
* Responsible for the administration of all federal, provincial, and territorial student financial assistance programs.
* Ensure that all reviews, confirmations, extensions, release of funds, and other processes for federal, provincial, and territorial student financial assistance programs are completed accurately and in accordance with regulations and service standards.
* Monitor and determine academic status for all OSAP students. Place students on academic restriction, academic probation or in academic good standing according to OSAP regulations and academic performance. Complete reviews for students with extenuating circumstances in relation to their academic status with OSAP.
* With information from Financial Services, prepares and submits cost codes to the Ministry of Colleges and Universities.
* Responsible for administration and reporting for loan programs for U.S. students.
* Determine eligibility and responsible for administration of emergency funding solutions.
* Oversee and assist with refund process to National Student Loan Service Centre.
* Contacts OSAP directly to advocate on students’ behalf for any delays or outstanding issues.
* Contacts National Student Loans Service Centre (NSLSC) on student’s behalf to assist the students with any issues and verify negotiated funding.
* Collaborate with other schools to ensure accuracy of records for students between institutions.

##### Student Awards

* Determine eligibility and responsible for the administration of all merit based undergraduate scholarships and awards.
* Determine eligibility and responsible for administration of all needs-based bursary programs for Undergraduate and Graduate students.
* Determine eligibility and responsible for administration and reporting of Government initiated bursary programs which include but are not limited to the Student Access Guarantee, Bursary for Students with Disabilities, and Institution Funded Special Bursaries.
* Work in collaboration with the External Relations and Advancement Office and Associate Registrar & Director, Service Delivery and Student Financial Support in creation and implementation of new donor funded Scholarship, Bursary, Prize, and Award accounts.
* Work in collaboration with Associate Registrar & Director, Service Delivery and Student Financial Support in creation and implementation of new institutional funded Scholarship and Bursary programs
* Maintain regular communication with External Relations and Advancement Office to coordinate disbursement of funds to meet the needs of all relevant stakeholders.
* Provide information and support to approved internal and external bursary and scholarship programs. This includes but is not limited to Metis Nation of Ontario Bursary Program, Trent Transit Bursary, Children of Alumni, Study Abroad Bursaries, etc.
* Oversees process and administration of departmental prize and award requests.
* Participate as a member of the Student Awards sub-committee of the Academic Planning & Budget committee (AP&B) Provides support and information to the committee. Prepares records and application data for the committee to use to review and adjudicate various Scholarships, Awards, and Medals.

##### Systems Administration

* Serve as the team lead between Financial Aid and Information Technology relating to the Financial Aid modules of internal student information systems and the integration of data from external systems.
* Assist with the continued implementation and further development of the Financial Aid module in Colleague.
* Assist with the evaluation of business processes related to Financial Aid for the efficient use of systems.
* Work closely with IT to ensure the coordination of services to students, and the effective use of resources.
* Responsible for obtaining, managing, and processing OSAP data using the OSAP upload and download functions available in the Ontario Government portal (ONe-key).

##### Team Lead

* Coordinate and oversee training plan for Enrolment Services staff in all aspects of Financial Aid. Provide ongoing leadership and support to the team. Identify areas of further training required by individual staff members and the team as a whole and work with the Associate Registrar & Director, Service Delivery and Student Financial Support to ensure adequate training is provided.
* Develop and maintain process documentation for all areas of Financial Aid to help ensure consistency for data management.
* Assist Associate Registrar & Director, Service Delivery and Student Financial Support with ensuring that Financial Aid activities within the unit’s annual work plan are on track.
* Oversees workflow and distribution of tasks to Financial Aid Administrators and Enrolment Services Associates.
* Monitor internal processes to ensure adherence to internal and external policies and regulations. Ensure staff are informed of any changes.
* Hire, train, and supervise student assistants.
* Lead hand to Financial Aid Administrators.
* Lead hand to Enrolment Service Associates, in collaboration with the Records and Registration Coordinator.

##### Other Duties

* Develop and execute a communication plan for Financial Aid to ensure that students, faculty and administrative staff are informed of important deadlines and policies.
* Provide advice to Associate Registrar & Director, Service Delivery and Student Financial Support regarding changes to processes, procedures, and regulations.
* Obtain and maintain authorization by the Province of Ontario as a Commissioner of Oaths. Provide ongoing Affidavit services for students as needed for OSAP purposes.
* Determine dates and deadlines for academic calendar.
* Act as a liaison with internal departments such as Student Accounts, Advancement, Student Accessibility Services, Trent International, etc.
* Assist with institutional recruitment and retention efforts by participating in information sessions for internal and external events.
* Develop and deliver information sessions on all aspects of Financial Aid.
* Develop and deliver Financial Literacy programming.
* Prepare Financial Aid Information sessions for high school students. Communicate with guidance counsellors to develop presentation schedules and coordinate staff to travel to attend presentations while maintaining office coverage.
* Continually evaluate Financial Aid processes to identify areas for improvement or opportunities to improve operational efficiencies.
* Responsible for documentation of all processes and procedures related to Financial Aid programs and the Financial Aid Coordinator role.
* Lead and participate in special projects as required.
* Ensures website and other publications are up to date.
* Provide support and backup to Financial Aid Administrators and Enrolment Services Associates, including triaging, and assisting with inquiries of all types and working at the service counter when necessary.
* Occasional travel to provide service or present at the Trent Durham/GTA campus is expected.
* Flexible work schedule, including evenings and weekends.
* Other duties as assigned.

#### Education Required:

* Honours Bachelor’s Degree (4 year).
* Master’s Degree preferred.

#### Experience/Qualifications Required:

* At least five (5) or more years of directly related, progressively responsible experience in a registrar environment, including thorough knowledge of Canadian federal, provincial, and territorial student financial assistance programs. As well as advanced knowledge of the Ontario Student Assistance Program (OSAP).
* Thorough knowledge of Trent University scholarship and bursary programs.
* Basic accounting/bookkeeping knowledge and understanding of Financial Literacy
* Experience and proficiency with an automated student information system. Colleague experience strongly preferred.
* Demonstrated knowledge of project management and the ability to manage multiple projects and schedules.
* Ability to maintain confidentiality is essential.
* Demonstrated excellent interpersonal, communication and customer service skills required with the ability to maintain a supportive, calm, patient, and service-oriented demeanor when dealing with upset or challenging students/clients.
* Proven ability to exercise sound judgment, tact, discretion, empathy, and diplomacy.
* Strong desire to be part of a collaborative, team-centered environment which emphasizes creativity, reliability, and out-of-the box thinking.
* Demonstrated ability to work independently or as a member of a team required.
* Demonstrated intermediate level proficiency in the use of MS Office (specifically Word, Excel, Teams, OneNote).
* Ability to work accurately in stressful conditions within tight deadlines required.

#### Supervision:

* Supervise and direct the activities of student employees
* Lead hand to the A-297 Financial Aid Administrators
* Lead hand to A-301 Enrolment Services Associate