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**Baptist University of the Americas**
**JOB DESCRIPTION**

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**TITLE:**         **FINANCIAL AID COORDINATOR**

**DEPARTMENT:**   **STUDENT SERVICES**

**REPORTS TO:**   **CHIEF OF STAFF**

**STATUS:**        **EXEMPT**

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**BASIC FUNCTION**: Administer and coordinate all the federal, state, institutional and outside funds designated for student financial aid.

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**RESPONSIBILITIES/TASKS:**
*NOTE:  Some descriptions may have more specific duties and/or goals and objectives attached to this form.  Such attachments normally reflect unique aspects of specific locations, shifts, departments, etc.*

1. Establish policies and procedures for the administration of financial aid programs.
2. Establish procedures used in maintaining records and student files.
3. Maintain student financial aid records.
4. Responsible for the administration of federal financial aid programs (Pell grant, Direct Loan, Federal Work-Study (FWS), and FSEOG).
5. Ensure all federal and state programs are administered in strict compliance with applicable regulations and requirements.
6. Ensure all reporting requirements are met on time. These include, but are not limited to, the FISAP, IPEDS, etc. Various scholarship donors, foundations, and organizations also require periodic reports (BGCT, ABHE, MFA, Military Friendly Schools Survey, etc.)
7. Ensure that all applicable regulations are followed when a student formally or informally withdraws from the university.
8. Ensure that all financial aid funds are refunded according to federal, state and institutional policy. Calculate and request refunds to students and the government.
9. Ensure that the University's Satisfactory Academic Progress (SAP) policy meets all of the standards of the federal regulations.
10. Evaluate student progress at the end of each payment period and place students not meeting the SAP in the proper Warning or Probation category. Oversee the notification of student's not meeting SAP. Review and respond to all appeals.

11. Coordinate method of verifying applicants' eligibility (enrollment status, satisfactory academic progress, etc.) before authorizing disbursement of aid funds.
12. Review financial aid applications and related documentation for compliance with eligibility requirements including verification.
13. Send statistical and demographical information (IPEDS) of the University to the US Department of Education during the three (3) collection periods.
14. Manage Direct Loan Program.
15. Develop and implement student loan default prevention initiatives.
16. Work as Certifying Official for the Veterans Affairs Department and maintain VA student records.
17. Ensure that aid authorization and aid disbursements maintain and remain distinct separate functions of the Office of Financial Aid and the Business Office.
18. Responsible for gathering information to prepare and submit Higher Education Emergency Relief Funds (HEERF) quarterly and annual reports.
19. Develop and recommend policies for financial aid, which support goals and policies of the institution, which ensure compliance with federal regulations.
20. Ensure institutional scholarships and restricted fund endowed scholarships are administered in compliance with intent of the scholarships and according to the policy and/or agreement for the scholarship.
21. Provide assistance to students and parents in the completion of federal and institutional financial aid application.
22. Maintain correspondence with students and parents.
23. Write and distribute award letters.
24. Develop and review financial aid applications and forms used to administer student aid programs.
25. Develop and keep up to date all financial aid handbooks and brochures.
26. Assist in the annual audit of the financial aid programs.
27. Work with the Business Office to reconcile student account balances.
28. Process institutional, denominational and other organization's scholarship applications.
29. Process Ministerial Financial Assistance for Texas Baptist students.
30. Represent the University to government agencies, students and the local community.
31. Participate in financial aid local, regional and national conferences and training for specific functions.
32. Develop annual budget for the Financial Aid Office.
33. Ensure all sources of aid are utilized while remaining within allocated amounts. This includes all federal, state, institutional and outside funds.
34. Provide formal and informal presentations on the university's Financial Aid program to a variety of audiences, using the appropriate audio-visual aids and participant handouts.
35. Serve as IPEDS Key holder.
36. Other duties as assigned.

Numbers 1 – 35 are considered Primary Duties for this job.

**POSITION EXPERIENCE & ABILITIES:**
*NOTE: These requirements represent minimum levels in order to perform the job on a satisfactory basis. Employee must have the ability to satisfactorily perform the essential functions of the job.*

Requires in-depth understanding of a comprehensive field of knowledge as evidenced by the attainment of a Bachelor's Degree in/or other related field.

1. Requires a minimum of 1-year prior related experience. Includes an ability to collect data, establish facts, and draw conclusions dealing with abstract variables.

2. Must be proficient in Microsoft Office software, including Word, Power Point, and Excel applications.

3. Working knowledge of EDConnect and EDExpress and other financial aid software.

4. Proficient problem solving skills required.

5. Proficient ability to speak, read and write English/Spanish is preferred, as this is helpful in serving our cross-cultural population.

6. Requires ability to communicate effectively both orally and in writing; ability to make presentations and speak in front of groups preferred.

7. Requires a strong sense of diplomacy and demonstrated success in developing strong collaborative relationships with organizational peers and outside colleagues. Requires ability to relate positively, influentially, and sensitively to a broad spectrum of persons in a variety of multi-tiered relationships and settings.

8. Requires recognized ability to meet multiple deadlines by maintaining a high level of organization.

9. Requires demonstrated strong analytical skills, including an ability to synthesize large amounts of information and to focus quickly on the essence of an issue; strong commitment to producing measurable results.

10. Requires ability to speak clearly and make self-understood effectively in face to face interactions; articulate with accuracy to speak on the phone.

11. Requires ability to hear and receive verbal instructions, answer phones, communicate with people in situations with some background noise.

12. Requires the ability to successfully communicate in a professional manner with a multi-ethnic population base in the community; ability to effectively communicate in writing.

13. Requires ability to work under minimal supervision with awareness that error may have serious consequence; exercise patience, initiative, and sound judgment following established guidelines.

14. Requires ability to effectively work under pressure and remain flexible as priorities change.

15. Requires personality attuned to the requirements of meeting the needs of students and parents. Actively able to demonstrate the ability to establish and maintain effective working relationships with other employees.

16. Requires ability to maintain confidentiality.

17. Proficient working knowledge and ability to accurately and timely operate and perform computer related tasks with specific equipment and software applications required.

18. Requires professional commitment to Christian principles and teachings so as to perform tasks and responsibilities in alignment with Baptist University of the Americas mission, vision, and values.

19. Requires ability to use up to 50 pounds of force occasionally, and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force continuously to move objects and/or people.

20. Requires ability to walk, stand and sit, sometimes for prolonged periods of time; ability to squat, climb stairs, kneel and twist. Requires ability to grasp, push, pull, carry or otherwise manipulate objects.

21. Requires sufficient good health to properly discharge duties. Employees shall not be permitted to work who have infectious disease or skin lesion for the duration of the communicability.

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**POSITION CRITICAL BEHAVIORS:**

*NOTE: These requirements represent minimum levels in order to perform the job on a satisfactory basis. Candidates must have the ability to satisfactorily perform the essential functions of the job.*

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1. <u>Team Player</u>. Work effectively with others in the organization and outside the formal lines of authority (i.e., peers, other units, senior management, and the like) to accomplish organizational goals and to identify and resolve problems.  Includes considering the impact of your decisions on others.

2. <u>Critical Thinking</u>. The ability to actively and skillfully conceptualize, apply, analyze, synthesize, and/or evaluate information as a guide to belief and action.

3. <u>Bias for Action</u>. The propensity to act or decide without customary analysis or sufficient information to achieve critical goals or objectives.   Includes responsible risk-taking.

4. <u>Self-Starter</u>. Demonstrate initiative to take action to achieve goals beyond what is necessarily called for.  Includes the ability to work in a less structured environment.

5. <u>Customer Service Orientation</u>. Make efforts to listen to and understand the customer (both internal and external), anticipate customer needs and give high priority to customer satisfaction.

6. <u>Self-Confidence.</u> Demonstrate initiative, confidence in oneself, resiliency and a willingness to take responsibility for personal actions. Have the courage to voice views that are unpopular.

7. <u>Thoroughness</u>. The ability to balance an attention to detail with the cost and benefit of doing so.

8. <u>Adaptability</u>. Maintain effectiveness in varying environments, tasks and responsibilities, or with various types of people. Stay agile in the face of change.

**BAPTIST UNIVERSITY OF THE AMERICAS VALUES:**

*NOTE: Baptist University of the Americas follows Christ-centered values administered with professional excellence. Organizational values are critical because they define Baptist University of the Americas (BUA) personality and provide our employees clarity about how to behave.*

1. <u>Core Values</u>. Our Core Values are behavioral traits that are inherent at BUA. These are:
   a. Christ-Centered (self-sacrificing, forgiving and biblical)
   b. Baptist (identity, and foundational)
   c. Holistic in our Teaching and Learning (dedicated to the mission and purpose of BUA in higher education)
   d. Integrity (with our responsibility and respect toward others)
   e. Cross-Cultural Competence
   f. Hospitality (providing customer service, internally and externally)
   g. Community
2. <u>Expected Values</u>. BUA also holds all employees accountable for those traits which represent minimum behavioral standards: Honesty, Integrity, Respect for Others, Hardworking, Fair-minded, Accountable, and Responsible.

*NOTE: Baptist University of the Americas complies with all the employment provisions of the Americans with Disabilities Act.*

The purpose of Baptist University of the Americas job description is to describe the basic function, major responsibilities/tasks and essential functions of each job so that employees can better know what is expected of them. The descriptions also provide information useful for recruiting, training, and performance appraisal. This document does not create an employment contract, nor does it modify the at-will employment status of all employees.

A job description is not meant to inhibit employee creativity or innovation. The description will be revised as job responsibilities change materially.

**I acknowledge receipt of this job description.**

I acknowledge that I have read this job description and any questions or concerns have been asked and answered to my satisfaction.  I acknowledge that I can perform all of the essential functions of this job.  I acknowledge that I thoroughly understand the requirements of this job.

Employee Signature                                                                Date