General Information

Company: Northwestern Michigan College  Supervisor: Berlin, Linda
Detail Job Title: Financial Aid Specialist  Department: Financial Aid
FLSA Status: Exempt  Functional Job Title: Financial Aid Specialist
Location: Preston-Tanis

Position Summary

The position processes federal, state, and institutional financial aid in compliance with all federal, state, and institutional guidelines and consistent with the College’s mission, values, and goals.

Essential Responsibilities

(Critical) Analyzes and verifies financial aid data to determine student eligibility and financial need utilizing the Federal database systems and the banner system for different aid programs.

(Critical) Advises and counsels students and parents regarding eligibility requirements, application procedures and available financial aid programs.

(Critical) Processes financial aid applications in accordance with applicable guidelines and regulations, and determines and awards complex financial aid packages, involving grant, loan, work study, scholarships, etc.

(Critical) Communicates and maintains quality working relationships with a diverse student, parent, faculty/staff, and community population, offering information and professional guidance on Student Financial Services, Records and Registration or other NMC matters.

(Critical) Participates in the development of the Financial Aid Department by reviewing, and/or revising brochures, manuals, handouts and other financial aid informational material, and reviewing and revising financial aid forms, policies and procedures.

(Critical) Responds to questions for Student Financial Services, Accounts Payable, Records and Registration from many sources such as students, families, outside agencies, etc. based on departmental policies.

(Critical) Responds effectively to requests for information, composing clear correspondence, through a variety of communication methods including email, telephone, and in-person. Refers staff, student, faculty, and others to appropriate information sources.

(Critical) Collects and processes financial aid documents in compliance with Federal and State regulations.

(Critical) Responsible for maintaining NMC scholarships by updating information in NMC scholarship database and NMC banner system.

(Critical) Performs Return to Title IV Calculations. Notifies students of adjustment to financial aid and updates the National Student Loan Database system of students status.

(Critical) Responsible for reviewing student Satisfactory Academic Progress and Petition for Evaluation appeals, takes to committee, and notifies student of appeal results.

(Critical) Reconcile regularly i.e. monthly and annually with NMC’s systems and the United States Department of Education.

(Critical) Complete yearly renewal and management of the NMC, State, and outside scholarship programs to include Banner set-up based on new regulations, policies, and procedures.

(Critical) Responsible for maintaining State scholarships by updating information in the banner system and State of Michigan system, verifying student eligibility, and awarding.

(Critical) Coordinate with other departments in selecting, awarding, disbursing, and reporting of student scholarships.

(Critical) Participate in the development and implementation of goals and objectives related to scholarship activities.

(Critical) Determine applicant eligibility for scholarships based on applicable guidelines and regulations.

(Very Important) Conducts financial aid workshops and presentations - both on-and off-campus, including some evening and weekend presentations - for students, parents and community members.

(Very Important) Attends and participates in meetings, conferences and events as required or needed.

(Important) Collects and processes other documents needed to assist students with their admissions, records or students accounts.
## Foundational Competencies

**ETHICAL BEHAVIOR AND INTEGRITY** Displays honesty, trustworthiness, and ethical behavior. Earns respect. Behaves in a straightforward manner with others with no hidden agendas. Builds trust and credibility through reliability and authenticity. Leads by example; words and actions are consistently aligned.

**COMMITMENT TO LIFELONG LEARNING** Actively pursues learning and development. Stays current in content area, acquiring and refining technical and professional skills.

**COMMITMENT TO QUALITY SERVICE, RESPONSIBLE STEWARDSHIP, CONTINUOUS IMPROVEMENT** Displays a commitment to excellence and to providing quality service to learners, co-workers, or others they serve. Consistently seeks feedback and looks for ways to improve service, promote quality, and make effective use of college resources.

**CREATING/CONTRIBUTING TO A CULTURE OF INNOVATION and THOUGHTFUL RISK-TAKING** Creates/contributes to an environment of safety and trust. Seeks to solve problems rather than affix blame. Willing to experiment and learn.

**AGILITY/ ADAPTABILITY/ TOLERANCE FOR AMBIGUITY** Easily adjusts to organizational and environmental changes; adapts responses and tactics to shifting or evolving situations; deals effectively with ambiguity and uncertainty.

**VALUING ALL PEOPLE** Genuinely interested in others. Shows concern and empathy for others. Shows patience, understanding, and acceptance of people with varied backgrounds and perspectives. Treats learners, co-workers, and direct reports respectfully and fairly.

**COLLABORATION/TEAMWORK** Actively and enthusiastically works with others to achieve a shared common goal. Gives credit and recognition to those who have contributed. Shares information and own expertise with others to enable them to accomplish group goals. Creates a sense of belonging in the team, a culture of inclusion. Collaborates across boundaries. Looks at problem solving at the institutional level (not just in own area or department). Open to sharing resources, working with other departments and organizations.

**ACCOUNTABILITY/PERSONAL RESPONSIBILITY** Meets commitments and keeps promises; gets things done. Acknowledges and learns from mistakes. Holds self and others accountable. Takes responsibility for achieving goals.

## General Competencies

### Building Effective Relationships
**Competency Source:** Internal  
**Importance:** Critical

- **Proficient**
  - Relates well with all kinds of people in a variety of situations. Develops and maintains effective communication and relationships. Demonstrates understanding, friendliness, courtesy, tact, and empathy to others. Is approachable; makes time for others. Is sensitive to cultural diversity, race, gender, disabilities, and other individual differences.

### Communications / Active Listening
**Competency Source:** Internal  
**Importance:** Critical

- **Proficient**
  - Has good sense of who needs to know what and keeps others informed. Communicates in a clear, concise, organized, and compelling manner. Gives others their full attention; listens without interrupting. Seeks to understand others’ points of view. Interprets both the words spoken and the non-verbal cues used by others.

### Global Awareness / Internationally Skilled
**Competency Source:** Internal  
**Importance:** Very Important

- **Basic+**
  - Understands the complexities and interdependency of world events and issues. Understands one’s own culture and history in relationship to others. Is open to new opportunities, ideas and ways of thinking. Is self-aware about identity and culture; demonstrates sensitivity and respect for differences.

### Strategic Understanding / Leadership
**Competency Source:** Internal  
**Importance:** Very Important

- **Basic+**
  - Explains how their role supports NMC’s mission and vision. Recognizes opportunities to help the organization accomplish its goals. Considers a broad range of internal and external factors in establishing goals and priorities. Consistently ensures a fit
## Functional Competencies

<table>
<thead>
<tr>
<th>Competency</th>
<th>Source</th>
<th>Importance</th>
<th>Level 1</th>
<th>Level 2</th>
<th>Level 3</th>
<th>Level 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accountability (Generic)</td>
<td>HRToolbench</td>
<td>Very Important</td>
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<tr>
<td>Accepts responsibility for starting, controlling, and concluding job tasks and assignments. Accepts responsibility for behavior.</td>
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<td>Attention to Detail (Generic)</td>
<td>HRToolbench</td>
<td>Critical</td>
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<td>Is thorough when performing work and conscientious about attending to detail and small facets of work.</td>
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<tr>
<td>Customer Service Focus (Generic)</td>
<td>Internal</td>
<td>Critical</td>
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<tr>
<td>Database Research Skill (Administration)</td>
<td>HRToolbench</td>
<td>Critical</td>
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<td>Uses the Internet or other automated database systems to research statutes, rules, regulations, policies, and case laws and applies research to specific case work.</td>
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<td>Knowledge of Customer-Related Policies, Systems and Procedures (Call Center / Customer Service)</td>
<td>HRToolbench</td>
<td>Very Important</td>
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<td>Knows the organization's policies regarding customer service; able to explain and use appropriate systems and procedures to enhance the customer experience.</td>
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<tr>
<td>Knowledge of Products &amp; Services (Call Center / Customer Service)</td>
<td>HRToolbench</td>
<td>Critical</td>
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<td>Has sound understanding of the products and services offered, the benefits, constraints, and appropriate uses of each.</td>
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<tr>
<td>Presentation Skills (Generic)</td>
<td>Internal</td>
<td>Critical</td>
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<td>Makes clear and effective formal presentations. Uses audiovisual aids, technology tools, and other supporting material effectively. Adapts communication for different audiences. Handles questions and answer sessions well.</td>
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<tr>
<td>Problem Solving (Generic)</td>
<td>Internal</td>
<td>Very Important</td>
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<tr>
<td>Diagnoses a situation and determines what relevant information and/or procedure to use; uses reason to generate and evaluate alternatives and to determine a course of action.</td>
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</table>
Process Improvement (Call Center / Customer Service)

Competency Source: HRToolbench
Importance: Very Important

Seeks ways to improve the processes for serving customers; identifies measures to serve customers more quickly and efficiently.

Level 3 Proficient: Sees the process from beginning to end and identifies opportunities for improvement.

Reasoning (Generic)

Competency Source: HRToolbench
Importance: Very Important

Identifies rules, principles, or relationships that explain facts, data, or other information. Analyzes information and makes correct inferences or draws accurate conclusions.

Level 3 Proficient: Recognizes and attends to multiple facets in issues and problems; uses a logical and systematic approach to analyze unfamiliar issues and problems; assembles relevant information from multiple sources.

Regulatory Compliance (Engineering)

Competency Source: HRToolbench
Importance: Critical

Understands all aspects of regulatory management and assures that appropriate regulations are adhered to.

Level 4 Proficient+: Somewhat greater than Proficient: Understands all aspects of regulatory management and assures that team members know and follow these standards; determines conformance/compliance; knows the cost of non-conformance/non-compliance.

Responsiveness (Call Center / Customer Service)

Competency Source: HRToolbench
Importance: Critical

Follows through on customer requests or commitments quickly and accurately.

Level 4 Proficient+: Somewhat greater than Proficient: Enthusiastically engages with the team or others on information requests; responds with appropriate sense of urgency.

Leadership

Scope
Serves as first line supervisor of a work group, or is an entry-level professional individual contributor.

Activities
- Instruct and train others
- Provide guidance and stability
- Share special or technical information with others
- Bring commitment and drive into the workplace.
- Lead by example
- Serve as a spokesperson or advocate
- Assign work activities

Subordinates
Direct: 
Indirect: 

Tools and Equipment

Banner
Calculator
Desk Top Computer
Fax Machine
Lap Top Computer
MS Access

MS Excel
MS Power Point
MS Word
Overhead Projector
Printer
Telephone

Education and Experience

Preferred Education: Associate's Degree

Preferred Experience: Between 2 and 5 years

Work Environment

Lifting Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Weight</th>
<th>Height</th>
<th>Distance</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Most Frequently Lifted Object</td>
<td>Under 10 lbs.</td>
<td>Waist level</td>
<td>1 - 9 feet</td>
<td>Several times per day</td>
</tr>
<tr>
<td>Heaviest Object Lifted</td>
<td>20 - 29 lbs.</td>
<td>Waist level</td>
<td>1 - 9 feet</td>
<td>Occasionally</td>
</tr>
</tbody>
</table>

Non-Lifting Repetitive Activities
- Arm Movement Several times per day
- Gripping Several times per day
- Sitting Continuously
- Standing Several times per day
- Talking Continuously
- Typing Continuously

Other Physical Demands
- Extended work hours
- Prolonged visual work
- Travel (10-24%)
Walking Several times per day
Writing Several times per day

Mental Demands
- Complex Calculations
- Complicated Planning
- Performing Multiple Functions/Activities

Other Challenges
- Heavy work volume
- Precise accuracy requirements

Licenses and Professional Certifications
None Required

Qualifications
Associate's degree or two years of college completed - Required
Bachelor's degree preferred
Customer service experience - Required
Demonstrated experience using Banner enterprise system (or other database system) - Preferred
Experience applying laws and regulations - Preferred
Experience reconciling and balancing financial accounts preferred
Minimum of 2 years experience in a complex business environment - Required
Prior experience working with Financial aid preferred
Valid, unrestricted Michigan Driver's License or ability to obtain by start date required

Contacts with Others

**Internal Contacts**

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees in your own work unit or department</td>
<td>Share Information</td>
</tr>
<tr>
<td>Employees in your function</td>
<td>Share Information</td>
</tr>
<tr>
<td>Managers in your function</td>
<td>Share Information</td>
</tr>
<tr>
<td>Managers in departments outside your function</td>
<td>Interact with or advise</td>
</tr>
</tbody>
</table>

**External Contacts**

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal/State Regulatory and Compliance Authorities</td>
<td>Investigate or Research</td>
</tr>
<tr>
<td>Customers</td>
<td>Interact with or advise</td>
</tr>
</tbody>
</table>