



FINANCIAL AID SPECIALIST

Position Description

The individual in this position helps residents get scholarships, work preparation, and work support financial aid so they can get and keep jobs or get better jobs. She/he helps residents obtain financial assistance and service from multiple sources, including The WorkSource.

Reporting Requirements

Reports to _____ (line supervisor)

External Relationships

Community Colleges, Universities, Career Colleges, Other Education and Training Providers, United Way, Community Based Organizations, Social Service Organizations

Internal Relationships

Resident Service Division: All career office staff but has a particular need to work well with Personal Service Representatives, Financial Aid Specialist Trackers, and Financial Aid Payment office Funds Analysts.

Employer Service Division: Recruiters, Business Consultants, Labor Market Analysts

Qualifications

- Bachelors degree and 1 year experience in career counseling or financial aid counseling or a Master's degree in education counseling

OR

- 4 years of experience working at The WorkSource in professional positions and a recommendation from current or most recent supervisor
- Knowledge of career counseling techniques and general financial aid available for students and workers in the community
- Knowledge of the workplace and jobs, including requirements for entry into work as well as knowledge of The WorkSource's targeted industries and demand occupations, and The WorkSource's services and delivery process

- Able to conduct labor market research on individual employers and industries, as well as specific occupations and their education, experience and credential requirements
- Able to listen to customers, analyze expressed needs and suggest solutions and action plan. Uses tact, diplomacy, and persistence in providing suggestions to customers.
- Proficient in Microsoft Windows and Office; familiar with and able to use computers; able to learn new software
- Works well in teams and with resident customers and other staff (flexible, congenial and adaptable)
- Able to communicate orally and in writing at a business level
- Self-motivated and self-directed
- Results-oriented

Duties and Responsibilities

Information

- Provides information on qualifying criteria for various sources of financial aid and directs customers where and how to apply
- Provides useful regional labor market information to help customers develop career goals
- Provides information on opportunities, qualifications, and expected pay in various industries and occupations
- Provides information relating to training courses and pre requisites to employment goals
- Provides electronic, print and other resources to help customers make career and job search decisions
- Provides information on recognizing quality child care, locating vendors, the type of child care services offered
- Connects customers, who may benefit from other career office staff specialists or other community resources, to that specialist or resource
- Uses the internet to research available financial aid, labor market information, and education information

Career and Financial Aid Counseling

- Helps customers relate employment goals to education
- Helps customers relate employment goals to other support services
- Helps customers understand the time and financial commitment required to meet particular career goals and guides the customer in choosing whether to make those commitments

- Provides expert advice on education and training organizations and institutions and educational programs available through those organizations
- Advises and helps customers access financial aid available through The WorkSource and other organizations

Financial Aid Eligibility

- Determines customers eligible for The WorkSource financial aid
- Recommends to decision makers who to award The WorkSource financial aid according to guidelines from the Board
- May help customers complete The WorkSource and other financial aid packages
- Enters information in the appropriate management information system and maintain physical/paper files as needed

Performance Expectations

1. The Financial Aid Specialist is knowledgeable about financial resources offered by The WorkSource and the community to help our customers get a job, keep a job, or get a better job.
2. The Financial Aid Specialist is knowledgeable about the labor market and can apply information to help each customer make good career decisions.
3. The Financial Aid Specialist communicates effectively to help the customer make good career choices based on accurate, thorough information.

Supervisors measure these expectations by

- ✓ observing the Financial Aid Specialist working with a customer,
- ✓ reviewing records completed by the Financial Aid Specialist,
- ✓ questioning the Financial Aid Specialist about how she/he works
- ✓ speaking with customers separately from the Financial Aid Specialist in person or over the telephone

A Financial Aid Specialist Review Form and Review Guide provide detail about areas the supervisor will review.

A financial Aid Specialist performance is:

- ✓ Outstanding – 90% - 100% of areas observed meet expectations. (54-60 per year marked acceptable)
- ✓ Proficient – 80% - 89% of areas observed meet expectations (53 – 48 per year marked acceptable)
- ✓ Unacceptable - 79% of areas observed meet expectations (47 or fewer per year marked acceptable)

4. Records Review – Five (5) areas are included in the financial aid records review. A Financial Aid Specialist will have performance expectations in each area she/he performs regularly.

The supervisor reviews three (3) customer records each month for each area noted on the review form to determine if the records are complete and accurate. The supervisor can use the same customer record to review more than one area on the form.

The five areas for review are:

- 1) Financial Aid Application is complete
- 2) Records demonstrate an economic need
- 3) Records include identification of all possible fund sources
- 4) Supporting documents are included
- 5) Information recorded correctly in The WorkSource Management Information System/s

A Quality Record Review Form and a Quality Record Review Guide detail the areas the supervisor will review.

The Quality of the records reviewed is:

- ✓ Outstanding – 90% - 100% of areas reviewed are complete and accurate
- ✓ Proficient – 80% - 89% of areas reviewed are complete and accurate
- ✓ Unacceptable - 79% of areas reviewed are complete and accurate

Overall Performance Rating

The supervisor rates each element on the Financial Aid Specialist Review Form (attached) at least once a quarter. Each element is rated Outstanding, Proficient or Unacceptable.

- ✓ Outstanding - Exceeds performance expectation – Both the supervisor observations **and** records quality meet the level of outstanding
- ✓ Proficient - Meets performance expectation – Is not outstanding or unacceptable
- ✓ Unacceptable - Does not meet performance expectation – Either the supervisor observations or the quality of records reviewed is unacceptable.

Performance will be the major consideration in awarding merit raises and bonuses and can lead to corrective action or termination.