

Financial Aid Specialist Quarterly Observation Reviewer Guide

A Supervisor or designee observes the Financial Aid Specialist monthly in one of three areas:

1. General Financial Aid Knowledge
2. Labor Market Information Knowledge
3. Customer Communication/Interaction

The three sections contain fifteen (15) performance elements. The supervisor completes one section each month and tabulates the overall score for the quarter at the end of each quarter.

The reviewer must exercise judgment and vary the method of evaluating each area so that over time the reviewer uses a variety of methods to determine proficiency. The available methods of observation include

- Questioning staff about what they know
- Reviewing records
- Observing customer interviews
- Speaking with customers separately from staff either in person or over the telephone

Some elements, such as time management, lend themselves to direct observation. Others, such as knowledge of eligibility guidelines, are likely to require questioning the Financial Aid Specialist or reviewing records.

The reviewer will write the method of evaluation on the form. She/he will check if the work was acceptable (A) or unacceptable (U) and enter a comment explaining what she evaluated, her evaluation of the quality of the work and the reasons she found the work acceptable or not.

For example, the first element under “Section I. General Financial Aid Knowledge” is demonstration of knowledge of eligibility for various sources of financial aid. The reviewer may have a conversation with the Financial Aid Specialist asking about various funding stream eligibility criteria. The reviewer will write “Questioning” under “Observation Method” on the form and will check either “A” for acceptable or “U” for unacceptable. The reviewer must note areas of deficiency and strength. She must make recommendations for remediation and share all comments with the employee.

Scoring: An overall acceptable quarterly score is 12 of 15 acceptable observations. An overall acceptable yearly score is 48 – 53 acceptable observations of the total 60 observations.