

POSITION DESCRIPTION

TITLE: Director of Student Financial Assistance - (Exempt)

Collective Bargaining - Ineligible - Managerial

Definition - The Board approved definition of a managerial employee is an employee who is engaged predominantly in executive and management functions of the College or who is designated with the responsibility of directing the implementation of management policies and practices and who customarily and regularly exercises discretion and independent judgment in directing the implementation of management policies and practices.

This is a management position. The incumbent is accountable for supporting the mission, goals, and objectives of the College and is expected to administer the policies and procedures defined in the Employee Handbook as approved by the President and the Board of Trustees.

JOB SUMMARY:

Reporting to the Vice President of Enrollment Management (VPEM), the Director of Student Financial Assistance serves as the chief financial aid officer for the institution and is a key member of the Enrollment Management leadership team. The Director provides strategic direction, policy leadership, and operational oversight for the Office of Student Financial Assistance and the administration of all financial aid programs. They are instrumental in shaping institutional strategies that promote equitable access, affordability, student persistence, and timely degree completion through thoughtful, data-informed use of financial aid resources.

The Director is responsible for managing a comprehensive financial aid portfolio encompassing federal, state, institutional, and private sources of student funding. The role requires balancing strict compliance with complex and evolving regulatory requirements while also designing and implementing innovative financial aid strategies that strengthen enrollment, net tuition revenue, and promote student success. As a visible advocate for financial literacy, transparency, and a student-centered service philosophy, the Director collaborates extensively with leaders across the College including Admission, the Registrar, the Business Office, Academic Affairs, and Institutional Research to ensure cohesive, mission-aligned support for a diverse student body.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

(Note: These examples are intended only as illustrations of the various types of work performed in positions allocated to this class. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position.)

- Responsible for following and applying the policies and procedures as defined in the Memorandum of Understanding (MOU) and/or the employee handbook.

Leadership & Strategic Direction:

- Responsible for the management and operation of the Office of Student Financial Assistance (OSFA), including planning, oversight of budgets, and staff development.

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- Provides strategic direction, policy leadership, and operational oversight for the administration of all student financial aid programs.
- Works with the Vice President for Enrollment Management to develop and implement financial aid strategies that optimize the College's financial aid resources to achieve strategic enrollment goals, improve socioeconomic diversity, and advance institutional commitments to equity, access, and success.
- Works closely with Admission, the Registrar, the Business Office, Academic Affairs, Student Affairs, and Institutional Research to ensure cohesive, mission-aligned support and services for prospective and current students.
- Serves as a member or leader, as designated, on Enrollment Management committees, teams, and work groups, as well as on other committees focused on the recruitment, enrollment, and retention of new students.
- Represents the OSFA and Enrollment Management Division on campus committees (e.g., Landers Scholarship Selection Committee, Residency Petition Review Committee) and as institutional representative to external groups, organizations, associations, and governmental agencies.

Policy, Compliance & Fiscal Integrity:

- Maintains internal controls, systems, and procedures; establishes policies for all financial aid programs to ensure fiscal integrity and compliance with applicable laws and regulations; and ensures all policies and procedures are documented and followed.
- Administers, controls, and coordinates federal, state, institutional, and private financial aid funds.
- Analyzes and disseminates rules and regulations of federal and state financial aid programs.
- Coordinates, with the Business Office, the College's participation in the federal Direct Lending program.
- Ensures that all Federal Direct Loan Programs are reconciled monthly with the Department of Education and the Business Office and oversees yearly close-out of Direct Loan fund balances.
- Oversees the review of independent student status applications and makes decisions on appeals.
- Oversees the review and evaluation of supplemental documentation provided in student appeals for adjustments or exceptions to financial aid awards.
- Manages the Merit Scholarship Notice and Revocation processes, including associated appeals.
- Monitors and manages Satisfactory Academic Progress (SAP), including appeals.

Data, Reporting & Analytics:

- Develops and documents procedures, queries, reports, and frozen data sets to extract, compile, and analyze financial aid data.

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- Analyzes and interprets statistical data; delivers ongoing reporting.
- Extracts financial aid data to track expenses, over-budget awards, Verification, SAP, and ISIR information.
- Compiles, analyzes, and reports financial aid data to support award strategies, fund management, evaluation of aid programs, and completion of annual reports and surveys including, but not limited to: Federal Fiscal Operations Report/Application to Participate (FISAP), Integrated Postsecondary Education Data System (IPEDS), Maryland Financial Aid System (FAIS), the Common Data Set, and NCAA.
- Works with Institutional Research and Planning to support data management in the OSFA: budgeting, reporting statistics, reconciliation, tracking applications, and monitoring SAP.

Technology & Systems:

- Works collaboratively to implement new strategies to comprehensively and effectively utilize and leverage technology in all aspects of office operations.
- Supervises coordination of technical support for OSFA.
- Ensures accurate and timely loading of all student financial aid data into financial aid systems.
- Optimizes the use of financial aid technology and implements new processes and efficiencies whenever possible.
- Imports and verifies financial aid data into College systems including program enrollment, budget process, audits, reconciliations, updates, and verification contact rollover.
- Ensures all financial aid-related information on the student portal and websites is accurate and current.

Student & Family Support:

- Responsible for timely and accurate counseling of prospective and current students and their families.
- Meets with prospective and current students and families to discuss financial aid issues.
- Ensures that financial literacy programs are identified, developed, and delivered regularly each academic semester.
- Responsible for identifying, promoting, awarding, and reconciling St. Mary's College Foundation Scholarships.
- Attends and presents at on- and off-campus recruitment and college awareness events, as well as external financial aid events, ensuring appropriate representation of the College.

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Staff Development & Collaboration:

- Cultivates a student-centered service paradigm and culture through the training, supervision, and evaluation of office staff performance.
- Ensures OSFA staff are cross-trained with Admission staff, and that Enrollment Management staff are cross-trained on student financial assistance programs.
- Demonstrates a commitment to staff development and contributes to the Enrollment Management division's welfare.
- Actively contributes to a positive work environment.

Other Duties:

- Coordinates activities with staff engaged in issuing or collecting student payments.
- Enthusiastically completes other duties as assigned.

MINIMUM QUALIFICATIONS:

- Education: Bachelor's degree required; Master's degree is preferred.
- Experience: Five to seven years of experience as a financial aid administrator, preferably as a director or associate director, with a thorough knowledge of federal and state regulations and be knowledgeable about current trends in financing higher education.
- Exceptional communication, interpersonal and organizational skills, and strong internal and external leadership abilities with an uncompromising commitment to student service and student advocacy.
- Strong attention to detail and an ability to multi-task effectively.
- Strong analytical and quantitative skills are required. Advanced experience with relational databases and Excel preferred.
- Knowledge of basic accounting skills and counseling skills required for the sensitive treatment of confidential family information.
- Active professional development participation to enhance job skills and to maintain up-to-date knowledge of current trends, challenges and opportunities in the field.
- Commitment to the mission of the College to provide access to a diverse population of students, including an understanding of the needs of first-generation college students as The National Public Honors College.
- Ability to effectively and tactfully work with students, parents, faculty, staff, the public, and diverse populations.
- Willingness and ability to work a flexible schedule, outside of normal business hours, as assigned.

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- Any combination of acceptable education and experience, which has provided the necessary knowledge and skills to fulfill the requirements of this position, may be considered.