



FINANCIAL AID COMPETENCY

CUSTOMER SERVICE

This competency highlights the communication, interpersonal, and problem-solving skills needed to effectively engage with students, families, colleagues, and the broader community. Financial aid administrators must provide clear, empathetic guidance while maintaining ethical standards, cultural competence, and a commitment to accuracy, confidentiality, and inclusivity.

Competency Statements

- Communication skills
- Advising
- Public speaking
- Financial literacy
- Cultural competence
- Flexibility
- Empathy and respect
- Personal responsibility

RESOURCES, TRAINING,
AND PROFESSIONAL
DEVELOPMENT OPPORTUNITIES



Knowledge Statements

Effective Communication

- Utilize strong written, oral, and interpersonal skills to engage with diverse stakeholders
- Interpret and clearly explain financial aid programs
- Advise on financial aid matters, balancing the best interests of students and the institution
- Provide consumer information and financial aid literacy education to students, families, and institutional stakeholders
- Represent the profession in public speaking engagements (e.g., financial aid nights, open houses, yield events)

Listen and Respond With Empathy

- Actively and attentively hear, process, and understand others, ensuring they feel heard and respected
- Demonstrate patience, empathy, and responsiveness in all interactions
- Understand student experiences and unique circumstances

Educate and Inform

- Provide basic financial education to students and parents
- Educate staff and faculty on how to support and utilize financial aid programs
- Develop presentations and resources for financial aid literacy and awareness

Adapt and Solve Problems

- Apply flexibility within established parameters to find mutually acceptable solutions
- Handle challenging situations calmly and professionally
- Reprioritize and multitask effectively
- Creatively solve problems to meet student needs and institutional goals

Demonstrate Cultural Competence

- Understand, appreciate, and effectively interact with people from diverse backgrounds
- Recognize and respect differences in beliefs, values, customs, and behaviors while adapting communication and approach
- Recognize personal cultural biases and perspectives
- Understand how cultural influences can impact financial aid functions, such as professional judgment and verification

Act With Integrity and Responsibility

- Follow through on commitments and promises made to stakeholders
- Maintain confidentiality and protect student financial records
- Provide accurate and honest information
- Avoid conflicts of interest
- Interact honestly and fairly, building trust and confidence

Task Statements

Engage and Support Students and Families

- Greet walk-ins and respond to phone calls and emails
- Meet with students and families to discuss financial aid options and processes
- Assist students with filing aid applications accurately
- Deescalate tense situations and appropriately escalate cases when needed

Maintain Privacy and Confidentiality

- Safeguard individual student financial records and sensitive information

Present and Educate in Public Forums

- Present at orientations, accepted student events, yield activities, and financial aid nights

- Deliver webinars and virtual information sessions
- Present to staff in other campus offices
- Assist with and speak at special events, such as Financial Aid Awareness Month in February

Develop and Implement Outreach Efforts

- Create financial literacy presentations and materials
- Develop and deploy communication plans
- Notify students of requirements, deadlines, and updates
- Organize and coordinate special events related to financial aid