



FINANCIAL AID COMPETENCY LEADERSHIP

This competency focuses on the leadership skills required to effectively manage financial aid operations, including strategic planning, resource management, staff development, and decision-making. Successful leaders demonstrate emotional intelligence, cultural competence, and accountability while navigating change, resolving challenges, and aligning office practices with institutional goals.

Competency Statements

- Strategic thinking
- Planning
- Critical thinking
- Problem solving
- Decision making
- Compromise
- Change management
- Emotional intelligence
- Program management
- Stewardship

RESOURCES, TRAINING,
AND PROFESSIONAL
DEVELOPMENT OPPORTUNITIES



Knowledge Statements

Strategic & Critical Thinking

- Consider how financial aid policies impact institutional goals and outcomes
- Plan and organize office operations and resources
- Allocate resources effectively
- Adapt to the changing pace of professional demands
- Manage crises and resolve problems with confidence
- Evaluate circumstances, identify solutions, and move forward in unstructured environments with incomplete information

Decision-Making, Problem-Solving & Compromise

- Understand boundaries and distinguish negotiable vs. non-negotiable items
- Adjust goals to fit the larger picture and institutional priorities
- Communicate effectively to find common ground and consider multiple perspectives
- Disagree respectfully and work toward solutions that benefit the whole

Change Management

- Anticipate and adapt to evolving political, institutional, and external environments
- Approach changes proactively and encourage flexibility among staff

Team & Talent Development

- Delegate tasks and assign responsibilities appropriately
- Develop team members and create succession plans

- Encourage growth through mentoring and professional development

- Support employee well-being and morale

Emotional Intelligence & Cultural Competence

- Demonstrate empathy, respect, and inclusive communication
- Utilize high-level written, oral, and interpersonal skills with students, families, staff, faculty, and community members
- Recognize and address one's own cultural biases
- Understand how cultural influences may impact key financial aid functions, such as professional judgment and verification
- Appreciate and effectively interact with people from diverse backgrounds, beliefs, and values
- Understand student experiences and socioeconomic contexts

Program, Resource & Process Management

- Manage programs and projects effectively and efficiently
- Implement technologies to promote success and process improvement
- Maintain transparency, ownership, accountability, and stewardship of resources
- Responsibly plan and manage budgets, staffing, and materials



FINANCIAL AID COMPETENCY

LEADERSHIP

Task Statements

Program Oversight & Administration

- Oversee packaging philosophies, awarding processes, scholarship reviews, and optimization of aid resources
- Process outside scholarships and manage institutional aid strategically
- Maintain operational, training, and communications calendars
- Manage the operational budget and ensure proper resource use
- Maintain training materials, office manuals, policies, and consumer information
- Implement standard office operations and ensure alignment with policies

Staff Supervision & Development

- Serve as a supervisor to staff and student workers
- Assign responsibilities, delegate tasks, and prioritize workloads
- Mentor employees and encourage professional growth
- Mediate conflicts between colleagues and maintain a positive staff culture
- Advocate for staff benefits and professional development opportunities
- Evaluate staff performance and hold team members accountable

Stakeholder Engagement & Representation

- Maintain relationships with internal and external stakeholders (e.g., VA Coordinators, consultants, third-party servicers, government relations, marketing/communications)
- Represent financial aid programs and staff as a spokesperson
- Share information effectively with superiors (“manage up”)
- Participate in meetings, committees, networking events, and professional associations at the state, regional, and national levels

Operational Improvement & Change Implementation

- Evaluate processes regularly and implement improvements as needed
- Leverage technology to improve efficiency and service quality
- Manage contracts and contractors

Time & Meeting Management

- Manage time effectively to balance priorities
- Run productive meetings with clear agendas and outcomes