

Job Functions and Standards: Setting Clear Expectations for Success

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Office of Scholarships and Financial Aid



Agenda

The Why

The Project

Structure

Project Implementation

Feedback

The Why

According to a 2022 Gallup poll of over 15,000 people, “quiet quitting” is real.

The drop in engagement began in the second half of 2021 and was concurrent with the rise in job resignations. Managers, among others, experienced the greatest drop.

*The **overall decline was especially related to clarity of expectations, opportunities to learn and grow, feeling cared about, and a connection to the organization's mission or purpose** -- signaling a growing disconnect between employees and their employers.*

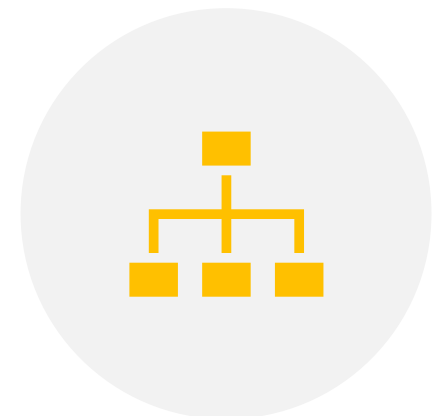
OSFA's Needs



CLEAR EXPECTATIONS
FOR STAFF &
SUPERVISORS



SETTING ALL PARTIES UP
FOR SUCCESS



REVISED ORG CHART TO
MEET DEPARTMENT &
STAFF NEEDS

The Project



Create consistent, transparent, and attainable job functions and standards for all OSFA employees.



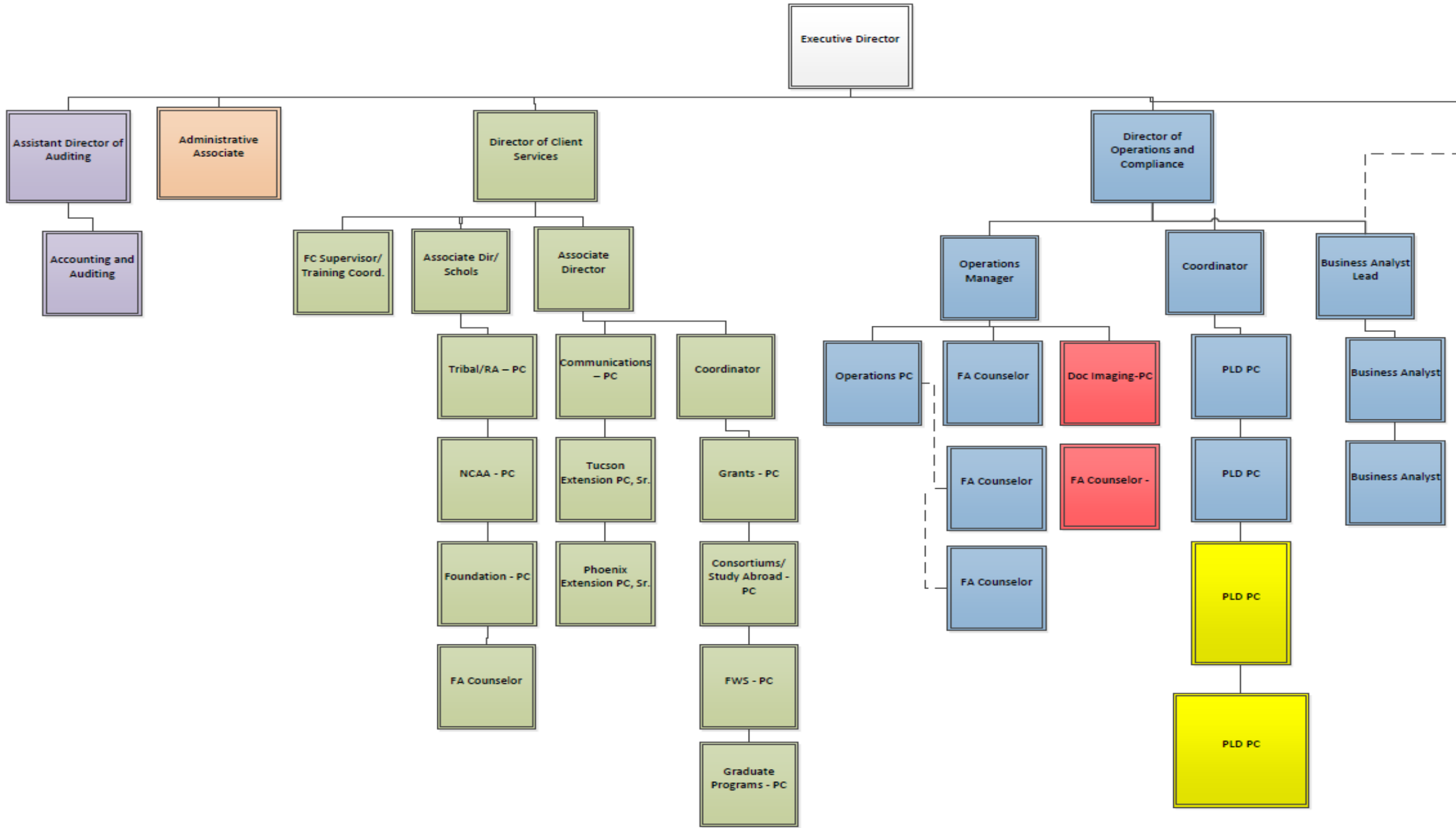
Used as a reference by staff and as a tool for supervisors

Origins

“How do I get an ‘Outstanding’ on my next performance review?”

“What do I need to do to get to the next level?”

No consistent progression/promotion ladder across areas



Associate Vice President

Director Client Services

Director Operations & Compliance

Assistant Director Financial Oversight

Assistant Director Client Services

Assistant Director Scholarships

Assistant Director Operations & Compliance

Business Analyst, Lead

Accountant, Sr.

Manager

FA Advisor, Int. Phoenix-based

Manager Front Counter Operations

Manager NAU Foundation

FA Advisor, Int. Private Donor

FA Advisor, Int. AZ Teachers Academy

Manager FA Processing

Manager Personalized Learning

Business Analyst, Int.

Accountant, Int.

Assistant Manager FWS, Study Abroad, eTRP

FA Advisor, Int. Grants

FA Advisor, Int. Graduate Programs

FA Advisor, Int. Communications

FA Advisor, Sr. ScholarshipUniverse

Assistant Manager Loans

Assistant Manager Verification & Documents

FA Advisor, Int. Personalized Learning

Business Analyst, Int.

FA Advisor, Int. FWS

FA Advisor, Int. ScholarshipUniverse

FA Advisor, Int. Loans

Business Analyst, Int.

Origins

“How do I get an ‘Outstanding’ on my next performance review?”

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No consistent progression/promotion ladder across areas

Needed measurable ways to demonstrate professional growth

Modeled after
*UC Berkeley’s
Core Competencies &
Behavioral Anchors*

Can’t change the university’s appraisal form, but we can change our office’s approach

Structure



Job Functions



Standards



Core Competencies

Job Functions

- Broken into 4-5 Job Functions, depending on level
- Combines all standard job description requirements from all financial aid position levels



Job Functions



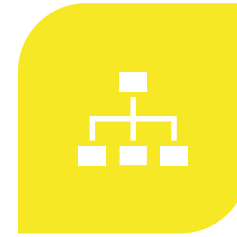
PERSONNEL
MANAGEMENT



TEAM
LEADERSHIP



DEPARTMENT
LEADERSHIP



UNIT
MANAGEMENT/
PROGRAM
MANAGEMENT



SUPPORT
DEPARTMENT
AND DIVISION
PRIORITIES

Job Functions, Standards, and Core Competencies

Manager

Client Services – Scholarships – Operations

Job Function 1: Personnel Management

Standards: Recruit, hire and train employees. Provide input for employment decisions. Oversee performance appraisals and employment decisions for team and make recommendations to Assistant Director (AD) for recognition or corrective actions. Support AD in reviewing job descriptions and evaluating unit structure when filling positions. Assist team in setting individual goals, both short and long term. Work with AD to ensure management of program budgets. Maintain awareness of strengths & weaknesses of the team as a whole. Support AD in allocating resources to ensure staff efficacy and to meet department priorities.

Core Competencies: Inclusiveness, Stewardship, Problem Solving and Decision Making, Strategic Planning and Organization, Quality Improvement, Leadership, Managing People

Job Function 2: Team Leadership

Standards: Supervise at least 1 full time employee and directly/indirectly supervise student employees. Coach, mentor, and motivate staff. Seek professional development opportunities for staff to improve upon job-related skills. Review completed work to ensure accuracy and provide constructive feedback for improvement. Resolve conflicts and consult with AD for solutions and actions. Promote team effectiveness and camaraderie.

Core Competencies: Inclusiveness, Stewardship, Problem Solving and Decision Making, Communication, Leadership, Teamwork, Service, Managing People

Job Function 3: Department Leadership

Standards: Serve on the OSFA Management Team. Participate in discussions related to staff matters, strategic planning and goal setting. Provide regular updates to AD on team's successes and opportunities for improvement. Handle student/parent escalations in person or via phone. Promote collaboration within area of responsibility and among all areas of OSFA, with campus partners, and with community liaisons. Communicate clearly and in a timely manner across all modalities: phone, email, IM Salesforce cases. Support AD with day-to-day management of the team. Serve as designee in absence of team's AD,

Core Competencies: Inclusiveness, Stewardship, Problem Solving and Decision Making, Strategic Planning and Organization, Communication, Quality Improvement, Leadership, Teamwork

Advisor	Asst Manager	Manager	Asst Director	Director
Personnel Mgmt	Personnel Mgmt	Personnel Mgmt	Personnel Mgmt	Personnel Mgmt
Team Leadership	Team Leadership	Team Leadership	Team Leadership	Team Leadership
		Department Leadership	Department Leadership	Department Leadership
Program Mgmt	Program Mgmt	Program Mgmt	Program Mgmt	Unit Mgmt
Support Dept & Division Priorities	Support Dept & Division Priorities	Support Dept & Division Priorities	Support Dept & Division Priorities	Support Dept & Division Priorities

Standards

- Lists job responsibilities for each function.
- Typically items found on job descriptions posted to HR website.



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Core Competencies

- A set of capabilities, skills, and knowledge deemed important by OSFA leadership.
- Assigned to each job function



Core Competencies

- Inclusiveness
- Stewardship
- Problem Solving & Decision Making
- Strategic Planning & Organizing
- Communication
- Quality Improvement
- Leadership
- Teamwork
- Service
- Managing People (Supervisors Only)



CORE COMPETENCY #1:		INCLUSIVENESS			
	Unsatisfactory	Needs Improvement	Good / Meets Expectations	Very Good	Exceptional
Demonstrates respect for people and their differences	Does not demonstrate inclusiveness; fails to recognize the value of differences.	Is often not aware of or interested in diverse backgrounds or points of view.	Respects, includes, and recognizes differences.	Respects, includes, and recognizes differences; creatively incorporates dissimilar views.	Highly inclusive; encourages, recognizes, and incorporates diverse points of view.
Understands the benefits of a diverse workforce	Does not understand or promote the benefits of a diverse workforce.	Has minimal understanding of the benefits of a diverse workforce.	Understands the benefits of a diverse workforce.	Promotes the benefits of a diverse workforce.	Actively promotes the benefits of a diverse workforce.
Is trusted and respected by others	Lack of inclusiveness fosters a lack of trust among customers and coworkers.	Tends to work either independently or with designated coworkers; trust is low among those not included.	Is respected and trusted by customers and coworkers.	Is highly respected and trusted by customers, coworkers, and campus partners in all dealings.	Is looked up to and highly respected by customers, coworkers and the campus community.
Includes and welcomes others	Is not welcoming or respectful; coworkers and campus partners often 'work around' to avoid interaction.	Is reticent to include new people or ideas.	Inclusive and open to new people and ideas.	Includes and welcomes diverse individuals and groups.	Actively creates an inclusive and welcoming environment for diverse individuals and groups across campus.
Works to understand the perspectives of others	Discourages different points of view; becomes defensive when asked to consider new/different ideas.	Is not always open to different points of view.	Seeks to understand and incorporate different points of view.	Is consistently open to and respectful of different points of view.	Promotes equity and inclusion by actively seeking ideas and insights from diverse sources.
Promotes opportunities to experience diversity on campus	Neither understands nor promotes opportunities to experience diversity on campus.	Needs to develop understanding and awareness of opportunities to learn about and experience diversity on campus.	Understands and promotes opportunities to experience diversity on campus for self and others.	Participates in range of opportunities to learn about and experience diversity on campus; encourages others to do the same.	Actively creates opportunities for others to learn about and experience diversity on campus.

Job Functions, Standards, and Core Competencies

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Structure

- Purposely generic so a Manager in any area of the office knows what it takes to succeed
- Shows that general skills are transferable between positions



Project Implementation

- Sponsored by Associate Vice President
- Started with both Directors and worked our way down to Financial Aid Advisor (entry level)
- Each is written by Director of Compliance with the help of the position's supervisor



- Once draft is created, meeting held with the employees currently in the positions to ensure the document encompasses all details

The How

*When it comes to determining how to achieve [the department's overall direction], employees will feel a greater sense of ownership if they can **contribute to the how**.*

*This how includes everything from **writing performance objectives to setting metrics** for objectives.*

-- John Baldoni

Feedback



Staff enjoyed being included in the creation of their own job standards – *input, ownership, buy-in*



Supervisors enjoy discussing and formulating standards with their staff while creating document



Supporting Employee Growth & Development

- Give recognition & rewards
- Provide feedback in real-time, not just during annual reviews
- Use an LMS
- Encourage mentoring and coaching
- Identify & develop soft skills
- Implement cross-departmental training programs
- Continue to look for developmental opportunities

Current State



Resources

- UC Berkeley Core Competencies and Behavior Anchors
<https://hrweb.berkeley.edu/files/attachments/behavioral-anchors-matrix-core-competencies.pdf>
- “Is Quiet Quitting Real?”
<https://www.gallup.com/workplace/398306/quiet-quitting-real.aspx>
- “Lead Your Boss: The Subtle Art of Managing Up” by John Baldoni
- “7 Ways to Support Employee Growth and Professional Development”
<https://www.glassdoor.com/employers/blog/support-professional-development/>

Contact Info



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OASFAA
2024
Unmasking Financial Aid

Thank you!