



Living Our Vision, Mission and Core Values

Financial Aid Officer

This document incorporates feedback received from employees of triOS College and Eastern College. Employees identified behaviours that are reflective of an employee working as a Financial Aid Officer living our vision, mission and core values. These behaviours help form the performance culture expectations of the Financial Aid Officer position at triOS College and Eastern College.



VISION

To improve lives
by sharing our knowledge
and passion for excellence.



MISSION

Helping students become
job-ready graduates.



VALUES

To practice:

- Integrity** Do what we say we will do
 - Dedication** Strive to be the best we can be
 - Readiness** Recognize and react positively to change
 - Respect** Treat others the way they want to be treated
- ... in all of our relationships.

Performance Culture – Financial Aid Officer

The role of the Financial Aid Officer is to provide a point of contact for all student financial transactions, and the maintenance and follow-up of all student accounts. Any student seeking admission to a program must pass through a consultation with the Financial Aid Officer for financial approval.

Below we have identified key behaviours for an Financial Aid Officer that are in line with our Vision, Mission and Core Values.

Integrity, do what we say we will do

1. Be accessible to students. Create an environment where students trust you and are comfortable coming to you to discuss their financial needs or concerns.
2. Provide timely and effective advice and counselling to students about their financing. Ensure that all financial advice is accurate and complete.
3. Discuss and recommend the best financial option to the student based on their needs.
4. Guide students through the student loan process. Ensure that student loan applications are fully packaged.
5. Assist students in the creation of a personal budget.
6. Follow-up with students to ensure all documentation is complete and submitted on-time to the appropriate funder.
7. Communicate to students the ramifications of defaulting on student loans.

Dedication, strive to be the best we can be

8. Make prospective and current students feel welcome and comfortable at the campus. This involves:
 - a. Creating a friendly, inviting, and supportive environment.
 - b. Greeting everyone with a smile.
 - c. Greeting students by name.
 - d. Being dressed in business casual attire.
9. Always answer the phone with a smile.
10. Arrive a minimum of ten (10) minutes before the start of your day to ensure you are organized and ready to go when your shift is to start.
11. Stay current and knowledgeable on the various funding sources and processes.
12. Go beyond the surface to understand issues and concerns raised by students relating to financing. Form a plan to address the root cause of the issues/concerns.

13. Ensure every student leaves the school feeling positive that they can start school and have the finances they need to do it.
14. Address any concerns students have with how much money they will receive and what the pay-back process looks like.

Readiness, recognize and react positively to change

15. Be proactive and adaptable to changing situations.
16. Consider and communicate all possible financing options to help off-set any potential financial shortfall the student may experience.
17. Make appeals to student loan funders to get funding for students above & beyond their initial assessment.
18. Find creative solutions for students when they experience financial difficulties that inhibit them from staying in school.
19. Maintain open communication with other team members that need to be aware of potential issues with a student's financing.

Respect, treat others the way they want to be treated

20. Treat everyone with respect.
21. Avoid having personal and sensitive conversations in open areas. Move these conversations to a private office.
22. Be empathetic, show patience and compassion, and be supportive to students that are nervous about their ability to fund coming to school or that are struggling to continue to attend school because of their finances.
23. Provide reassurance to students that may not be confident about being able to fund coming to school.
24. Maintain professionalism when dealing with students that are agitated and upset. Never appear judgmental, exasperated or annoyed.
25. Maintain confidentiality of the student's financial and personal information and situation.