



Student Success and Financial Aid Advisor

Under general supervision, perform various complex duties involved in providing student success advising and financial aid services. The **Student Success and Financial Aid Advisor** reports to the VP Institutional Advancement and works closely with the Director of Admissions and adjacently to the Registrar. This position supports and assists the Director of Admissions during the admissions process as needed and then serves as the primary student contact following admission, receiving new students in a “hand-off” from the Director of Admissions. The **Student Success and Financial Aid Advisor** informs, encourages, advises, and supports students through the student lifecycle as they matriculate through various academic programs.

Student Success

Assist the Director of Admissions with the prospective student application process: answering communications, participating in informational sessions and marketing meetings, providing feedback, keeping records. Support the Admissions team by promptly addressing inquiries received through various channels including email, ad campaigns, sales text messaging apps, website, and social media platforms.

Collaborate with Director of Admissions and VP Institutional Advancement to plan and execute new student orientation each semester. Coordinate student services and resources for students. Advise new and returning students in coordination with faculty advisors and registrar to help them successfully navigate their chosen programs.

Serve as initial point of contact for student questions once admitted to a BST program. Provide support for students in the use of BST accounts (email, Moodle, Populi). Supply necessary forms, information, and materials to help students successfully navigate their academic programs.

Maintain accurate records in Populi. Aid the registrar with maintaining information about upcoming class offerings and course scheduling needs of students. Collaborate with the admissions and academic departments to establish clear application and advising week deadlines for each academic year.

Design and implement student success interventions. Identify and document student success flags. Identify at-risk students and apply relevant interventions, or referrals for students experiencing family, personal or economic crises; work with special needs populations to identify unique needs and coordinate appropriate services. Support the student body and efforts to build community. Interface with student council to enrich the student experience.



Financial Aid

Assist and advise students applying for federal, state and institutional financial aid programs; research available options and sources; discuss various eligibility criteria and explain ineligibility as necessary; interpret and explain Berkeley School of Theology's financial aid policies and procedures.

Provide students with proper applications, documents, forms and reading materials; assist students in filling out and reviewing applications and supporting documentation for completeness and accuracy. Analyze and verify student financial data; evaluate student's ability to pay for education based on the FAFSA.

Prepare and award well balanced financial aid packages based upon determined needs; disperse award notification; advise students on terms, conditions, requirements, and limitations of awards; resolve data conflicts and over-awards, as necessary. Maintain financial aid student records and other records by reviewing and updating pertinent data via computer; review and prepare computer inputs under prescribed guidelines.

Participate in a full range of reporting duties; assist in compiling, analyzing, and maintaining data for the maintenance of various records and the preparation of various reports. Interact with federal, state, scholarship, social services and related agencies and financial institutions to facilitate the student eligibility process.

Oversee the Student Loan Program at BST and interface with FA Solutions to maintain records and compliance with Title IV regulations. Continuously track borrowers' statuses through government websites like NSLDS (National Student Loan Data System) and COD (Common Origination and Disbursement) to maintain compliance.

Utilize professional judgment to adjust a student's eligibility based on documented mitigating circumstances in accordance with federal statutes; may refer complex eligibility situations to Director of Admissions or VP Institutional Advancement.

Attend school events when the financial aid officer's presence is necessary.

Collaborate with the Business Office to facilitate the application process for institutional scholarships and the distribution of federal loans. Coordinate with the Registrar's office to report updates on the cost of attendance.



Conduct student surveys as needed to gather data for updating the cost of attendance.

Other duties as assigned.

Minimum Education and Experience

Education:

Bachelor's Degree, required

Experience:

Nonprofit sector, preferred

Higher Education, preferred

Minimum Qualifications

The following describes the knowledge and ability required to enter the job and/or be learned within a brief period to successfully perform the assigned duties.

Cross-cultural communication skills and a commitment to developing increasing inter-cultural competence.

Basic office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, and databases.

Principles of business letter writing, basic report preparation, and record keeping.

Effective oral and written communication skills. Attention to detail.

English usage, spelling, grammar, and punctuation.

Desirable Qualifications

Bilingual, Spanish preferred

Higher Education Experience

Theological and/or Religious Literacy

Coaching/Advising Experience

Deep Listener

Non-Anxious Presence

**Job Work Schedule**

40 hours/week, Monday – Friday, 8:30 am – 5:00 pm, hours may vary depending on department needs, occasional evening and weekends required as needed, 12 months/year.

Physical Demands and Working Environment

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential job functions.