

**YUKON UNIVERSITY**  
**POSITION DESCRIPTION**

**PART I - IDENTIFYING DATA**

Position Number: YC1969  
Position Title: Funding Advisor  
Incumbent:

Division: Office of the Registrar

Headquarters: Ayamdigut Campus  
Supervisor's Name: Samara Robertson-Lawless  
Supervisor's Title: Associate Registrar,  
Registrations & Records  
Date Description Completed:  
Date Description Updated: June 30, 2023

**PART II - SUMMARY**

Reporting to the Associate Registrar, Registrations & Records, the Funding Advisor provides a variety of support for students looking for financial aid. This includes promoting and building upon our current student awards, bursaries, and scholarships. This also includes assessing and maintaining our emergency fund, being knowledgeable about outside funding options for students and advocating for them when necessary. The Funding Advisor also supports the recruitment of potential students to Yukon University by providing prospective students with accurate information about entrance awards, scholarships, bursaries, and loans to help them find funding options for their education prospects.

**A. Duties and Responsibilities**

**1. Major Function - the most important activity or responsibility required (describe what is done, why it is done, and how it is done):**

**Performs a variety of duties related to the provision of information, guidance, and assistance to students on a variety of financial aid programs including student loans, grants, scholarships, bursaries, and part-time funding by:**

- Providing information, advice, and assistance to students with regard to financial aid programs by maintaining and disseminating current and accurate information on financial aid;
- Assisting students in completing financial aid applications and supporting documentation, i.e. government loans/grants, fee deferrals, emergency loan applications, bursary, scholarship and award applications. Reviews applications for accuracy and completeness and assists with corrections, as needed, in accordance with policies;
- Processing Financial Aid provider verification forms and supporting documentation (I.e. NWT SFA Form D, Student Training Allowance, Canada Student Loan Registration Confirmation form, etc);
- Coordinating and presenting financial management workshops for students looking for or receiving financial aid;
- Assisting students applying for tuition deferrals;
- Keeping up to date with all territorial, provincial, and federal financial aid regulations and ensuring that University policies and procedures are in compliance;
- Identifies, researches and resolves problems related to student funding issues including reasons for funding delays, outstanding tuition fees; reviewing student history of withdrawals, etc.;
- Maintaining student financial aid records, both paper and digital, by adhering to Yukon privacy standards, University policies, and upholding confidentiality;
- Provides information, assistance and related services to the public, students, faculty, and staff in a pleasant, timely and customer focused manner.

**Approximate percentage of job time above functions are performed: 50%**

- 2. Other Principal Activities, in order of importance (describing for each what, why, and how, an approximate percentage of job time required, rounded off to the nearest 5%)**

**Works to expand University awards, scholarships and bursaries and provides support to the Office of the Registrar and Yukon University by:**

- Providing information on financial aid programs to Yukon University faculty and staff; including explaining the application processes, general eligibility requirements and important deadlines;
- Coordinating Yukon University awards, scholarships, bursaries and emergency fund applications by chairing the Awards and Student Emergency Fund Committees. This includes maintaining current information, promoting scholarships/bursaries, organizing committee meetings, working with the committee to evaluate applicants, making arrangements for payment to award winners, organizing award presentations (including annual awards night as required), etc;
- Researching funding opportunities available to domestic and international students by creating and maintaining a network of financial aid partners; including government and private organizations.
- Maintaining knowledge of financial aid programs as well as changes to programs or policies within Yukon University.
- Regularly reviews and updates financial aid information on the university website;
- Creates and works to implement a student financial aid strategic plan that encourages student success by removing barriers and supporting student financial wellness.

**Approximate percentage of job time above functions are performed: 45%**

- 3. Examples of Additional Divisional Activities which may be performed:**

- Assisting with registrations and records, and convocation, if required during peak times
- Special projects
- Other related duties

**Approximate percentage of job time above functions are performed: 5%**

- 3. Approximately how long will it take for a fully qualified employee from outside the work unit to reach the full working level of the position:**

One academic year

**B. Problem-solving and decision-making**

- 1. a) List any sections of Acts, Regulations, and Policies or Procedures the incumbent must be fully familiar with in order to perform the position's functions:**

- relevant sections of Yukon University's Policies and Procedures
- relevant University agreements with outside partners
- Yukon University Academic Regulations and Procedures
- Yukon University Academic Calendar
- Yukon University Viewbook
- High School graduation requirements and grade 11 and 12 course requirements
- Yukon Government Student Financial Aid program details.
- Canada Student Loan program details

- Provincial and Territorial governments funding program details
- The Access to Information and Protection of Privacy Act

**b) Is the position responsible for interpreting, administering, or enforcing any of the above? If yes, explain.**

Yes, in the context of carrying out all duties and responsibilities.

**2. a) Describe the kinds of recommendations the incumbent is regularly required to make and to whom:**

- Students – providing accurate and up to date information about all types of financial aid they may apply for or receive.
- Staff – providing guidance in funding that may be available for students during program development.
- Associate Registrar - recommendations for changes and improvements regarding student financial aid and relationships and partnerships with community interest groups, clients, and other agencies
- Committees – regular updates about student applications/requests student emergency funds, awards and other related financial aid functions.

**b) Who normally makes the final decisions with respect to those recommendations?**

Associate Registrar, Registrations & Records and Registrar and Associate Vice President Student Life

**3. a) Describe the kinds of final decisions regularly made for which the incumbent is held accountable.**

- Student eligibility for funding.
- Scheduling of individual work activities, setting priorities among job tasks and providing accurate information to the public

**b) What is the direct impact of those decisions?**

- Student recruitment, satisfaction, success, financial health, and retention
- Decisions have a direct impact on award and emergency aid committee selections.
- Public reputation of the University as an accessible, supportive institution is dependent upon accurate information, deadlines, etc.
- Accuracy and currency of student financial aid records

**C. Freedom to Act**

**1. Describe the way in which this position receives direction:**

The incumbent sets day-to-day priorities and is responsible for scheduling their day. Occasional input will come from the Registration and Records team and Associate Registrar; University academic regulations, policies and procedures, and institutional goals and objectives.

**2. What legislation, regulations, procedures, or established practices guide, constrain, or limit the activities of this position?**

See B 1a above

**3. How is the work of the position normally checked or evaluated?**

Feedback from University students, employees, Records and Registration team members. Regular checks and feedback, as well as performance evaluations done by manager.

**4. What types of decisions are normally referred to the supervisor? (Give examples)**

- New administrative policies and procedures;
- Significant changes in ongoing projects;
- Changes to terms of reference

**D. Financial Accountability**

**1. a) Annual Budget (for unit under the direct control of the position):**

Fiscal year:	\$
Annual payroll:	\$
O/M Budget (excluding payroll):	\$
Capital Budget (excluding payroll):	\$
Revenues:	\$
Recoveries:	\$

**b) Who prepares this budget?**

**c) What is this position's accountability for budget once allotted?**

**d) Does position have authority/ability to reallocate resources?**

**e) Signing authority levels:**

**2. Other expenditures or revenues influenced by this position and how.**

**E. Management Supervision of Human Resources**

**1. No direct supervisory duties**

**2. Supervisory duties**

a) Number of positions supervised directly: Permanent \_\_\_\_\_  
Aux/Casual \_\_\_\_\_

Number of positions supervised indirectly: Permanent \_\_\_\_\_  
Aux/Casual \_\_\_\_\_

**b) Nature of supervision: (check any of the following supervisory tasks that are to be performed on a regular basis):**

	a.	show colleagues how to do tasks
	b.	train other employees in work procedures
	c.	assign work and review for quality/quantity
	d.	establish work priorities and schedules
	e.	change duties and responsibilities
	f.	participate with supervisor in employees' performance evaluations, <u>or</u> formally appraise employees' work performance and discuss appraisal with them, making a final recommendation to advance or withhold merit increments



Standing	10%
Walking	5%

c) Describe any physical hazards present:

Type	Percentage of Time
Road Conditions	5%

d) Describe special physical conditions leading to discomfort:

N/A

e) Interpersonal Conditions: Check any of the following conditions, which are normal and expected in the job and give examples:

	High level of dissatisfied clients
X	High level of emotional clients e.g. students having financial/personal problems
X	Potential physical abuse from clients
X	Regular critical deadlines e.g. short notice on workshop/travel schedules requiring booking of vehicles, obtaining supplies, payroll, hiring of contract employees, high level of irregular critical deadlines
X	Constant interruptions e.g. telephone and walk in clients
X	Instructions from more than one source e.g. instructions from Director and division staff
X	Students or staff under work related stress e.g. students in financial/personal problems

**Examples in support of above:**

- Working with clients in serious financial need that may be at risk.
- Abusive communication from clients when unable or not permitted to meet requests.
- Year-round funding and award deadlines.
- High volume and demand from telephone, in-person meetings, email, requests for documentation; interruptions from colleagues.
- Varying and inconsistent communication from program areas and departments, and funding agencies.

f) Travel Required

- |    |                                      |                          |
|----|--------------------------------------|--------------------------|
| a) | average number of trips annually     | <u>1-4</u>               |
| b) | average number of days per trip      | <u>2.5</u>               |
| c) | average distance per trip            | <u>500 km</u>            |
| d) | most frequent mode of transportation | <u>Rental car or Air</u> |

## I. Organization Chart

- Complete portion above dashed line whether the position supervises or not.
- Complete portion below dashed line if this position supervises others.

### **SENIOR MANAGER'S POSITION**

Title: Registrar and Associate Vice President Student Affairs  
Classification: TBD

### **IMMEDIATE SUPERVISOR'S POSITION**

Title: Associate Registrar, Registration and Records  
Classification: BU08

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**PEER POSITIONS: (all those reporting to the same immediate supervisor)**

Title: Graduation and Transfer Credit Officer

Classification: BU06

Title: Registration and Records Officers x 3

Classification: BU06

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**SUBJECT POSITION TITLE: Funding Advisor**

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**SUBORDINATE POSITIONS:**

N/A

**PART III – SIGNATURES**

I confirm that this describes the duties and responsibilities I require of an incumbent in this position and have reviewed the description with the incumbent (where applicable).

I have read the foregoing position description and understand that it is a general description of the duties and responsibilities assigned to the position I occupy.

.....  
Dean/Director or Designate

.....  
Incumbent

Date: .....

Date: .....

**PART IV - QUALIFICATIONS**

**To be completed by the Dean/Director or designate**

**A. Minimum Knowledge, Skills, and Abilities Required**

- Two (2) years recent related experience within an educational environment using a student information system (i.e. Banner);
- A clearly demonstrated understanding of Canadian postsecondary education systems and financial aid processes;
- Ability to interpret, understand, and consistently apply legislation, rules, regulations, and procedures and to keep apprised of relevant updates or changes;
- Ability to provide information, assistance and related services to the public, students, faculty, and staff in a pleasant, timely and customer focused manner;
- Excellent communication skills, both orally and in writing;
- Ability to develop and deliver informative and impactful presentations and/or workshops.
- Proficiency with a variety of computer applications including MS Office Suite and Adobe
- Ability to conduct preliminary research and prepare reports on findings;
- Strong attention to detail;
- Ability to make decisions and act under pressure and tight deadlines;

- Ability to maintain confidentiality and to handle sensitive and highly confidential documents and situations;
- Commitment to equity, diversity, inclusion, and the promotion of a respectful and collegial learning and working environment;
- Strong team player, and desire to work within a diverse and busy team;

**B. Licenses, Certificates Required - Give title and section of any legislation, regulations, or other authority where applicable.**

- Bachelor's degree in Business Administration, Finance, Education, Psychology, Counselling, or a related discipline or equivalent work experience.

**C. Other skills and/or knowledge which may be desirable, but not necessarily essential to the performance of the position's duties.**

- Experience and/or training in post-secondary student financial aid.



**PART V –UNIVERSITYSIGNOFF**

Comments:

I approve this position description as being representative of the work I require to be performed and that the responsibility levels identified have been delegated to this position.

.....  
Director, Human Resources Services

.....  
University President

Date: .....

Date: .....

**FOR HUMAN RESOURCE SERVICES USE ONLY:**

Evaluation Point Results:	
Knowledge and Skills:	.....
Accountability:	.....
Mental Demands:	.....
Working Conditions:	.....
Total Points:	.....
Pay Level:	.....