



Worcester Polytechnic Institute

Worcester Polytechnic Institute (WPI) Director of Student Aid and Financial Literacy

Worcester Polytechnic Institute (WPI) is seeking a director of student aid and financial literacy. This position is a senior level role within the enrollment division of the university and reports to the [Dean of Admission and Financial Aid](#). The director of student aid and financial literacy will work closely with the dean to provide strategic direction and regulatory compliance for undergraduate and graduate student financial aid. The ideal candidate will offer a strong collaborative spirit and an established record of success in the financial aid arena.

The nation's third oldest private independent technical university, WPI was founded in 1865 to create and convey the latest science and engineering knowledge in ways that are most beneficial to society. Today, WPI holds firm to its founding mission to provide an education that balances theory with practice. [President Laurie Leshin](#) leads WPI, and the [Senior Vice President for Enrollment & Institutional Strategy](#) oversees the enrollment division. WPI serves 4,500 undergraduates and 2,000 graduate students enrolled in more than 50 undergraduate and graduate programs, in 14 academic departments, leading to bachelor's, master's, and doctoral degrees. WPI is a private not-for-profit four-year university that requires students to complete both the Free Application for Federal Student Aid (FAFSA) and the CSS PROFILE to be awarded financial aid.

The beautiful campus containing 35 buildings on 80 acres is located in a residential area of Worcester, Massachusetts, the second largest city in New England. The university provides its students with cutting-edge environments for learning and research. WPI is known for its project-based approach to undergraduate education, challenging students to use their expertise in science and engineering to solve real world problems that have a positive impact on the lives of others. [The WPI Plan](#) is a truly distinctive, proven, and highly-effective model for undergraduate learning that's both flexible and rigorous. Through the Plan, WPI students learn through a collaborative education that is project-based and globally engaged. WPI's distinctive seven-week term system and grading policy further differentiate the university from other STEM institutions.

Principal Responsibilities: The director of student aid and financial literacy will lead, mentor, and guide the office and the campus community in all areas related to financial aid and financial literacy. The director should possess strong communication skills and a commitment to excellent service to internal and external constituents, especially students and their families. The director is a member of the cross-functional undergraduate enrollment leadership team and works in close collaboration with the dean of admissions & financial aid, the director of undergraduate admissions, the director of pre-collegiate outreach programs, and the director of undergraduate enrollment services. In addition, the director partners regularly with other campus departments including the offices of finance, the registrar, and university advancement. The director will execute, lead, motivate, and energize others in the following areas of responsibility:

Strategic Financial Aid Visionary: Possessing technological acumen, the director will lead the student

aid and financial literacy team's work with an external financial aid vendor (EAB). The director is part of a financial aid optimization team overseeing this work that includes the dean of admissions and financial aid, the director of undergraduate admission, and the director of institutional research. The scope of this work includes data collection and analysis, and the development and implementation of strategic financial aid modeling, leveraging, packaging, and net tuition revenue projections based on enrollment and discounting. The director will also actively engage with the dean's senior leadership staff on issues of vision tied to financial aid and recruitment strategies. Financial aid modeling and analysis will be designed to meet the overall enrollment and net tuition revenue goals of the institution. An openness in communication, and transparency of methods, goals, and results will be shared with key stakeholders, including the finance department, the committees of Student Task Force and Financial Aid Appeals, and other key stakeholders as necessary.

In addition, the director will work toward continuous improvement, efficiency, and automation in office operations. WPI is currently undergoing transitions to the Student Information System (SIS) from Banner to WorkDay, and has recently implemented Salesforce for both the admission and student aid customer relationship management (CRM) tool. Utilizing the CRM and SIS, or other systems necessary for effective financial aid processing and record-keeping, the director will ensure that the office is providing timely, high-quality communications that effectively meets or exceeds the needs of students and parents in all aspects of the financial aid application process, including document requests and the delivery of financial aid award notifications.

Staff Manager and Mentor: The director will foster a supportive environment in the Office of Student Aid and Financial Literacy built on a foundation of leadership, trust, and investment in the professional development of team members. The director will lead and mentor a team of fourteen experienced financial aid professionals effectively with the ability to set goals, guidelines, and expectations while allowing for greater autonomy in individual roles. Employing best practices in customer service and compliance, the director will continuously evaluate and improve the operations and processes within the office to ensure operations are flowing as seamlessly as possible. A focus on excellent service will be a guiding principle for the student aid and financial literacy team. The director will facilitate training, support, and professional development that will generate an effective and efficient environment that benefits team members, the WPI community, and the students and families that the team serves. The director will also help to promote and encourage detailed cross-training of financial aid for all non-financial aid staff within the enrollment division. Similarly, cross-training of the student aid team in other enrollment areas will also be encouraged. The director provides direct supervision for the director of financial aid operations, two associate directors, two information analysts, and the office manager.

Leader in Financial Literacy: The director will lead and support WPI's established financial literacy program, organized by a committee within the student aid and financial literacy team, that serves WPI's undergraduate and graduate students. The director will also assess and consider additional financial literacy efforts that align with departmental and university goals for audiences that may include pre-collegiate program participants, faculty and staff, and the local community. The director and/or members of the committee will attend and occasionally present at conferences focused on financial literacy.

Effective Compliance Officer: Among the director's most crucial roles is the effective execution of the university's financial aid program. The director is the leader of WPI's institutional compliance efforts for financial aid and will guarantee 100-percent accuracy in compliance with all federal, state, and

local regulations as well as WPI's institutional policies. Providing ongoing training and professional development for the staff regarding updates to rules and regulations is required. The director will oversee all regulatory compliance in Title IV federal financial aid and the state MASSGrant, as well as any reciprocal state grant programs. The director will ensure that staff understand and are in complete compliance within their respective responsibilities. Audits, program reviews, FISAP, Program Participation Agreements, and all other sources of government-required documentation and review will be carried out or coordinated by the director. The director will serve as WPI's primary Destination Point Administrator (DPA) for the federal Common Origination and Disbursement (COD) system. The director will collaborate with other administrative offices, in particular the registrar's and bursar's offices, as well as the finance office, to assure smooth transactions for students and compliance at all levels of financial aid eligibility, packaging, and disbursements.

Experience, skills and characteristics necessary for success: The successful candidate will have at least seven years of progressive, direct experience in financial aid; a bachelor's degree is required and an advanced degree is preferred. In addition, the director of student aid and financial literacy should possess the following:

- Personal commitment to providing excellent customer service
- Strong communication skills
- Proven capability to lead others
- Openness and transparency
- Collaborative spirit
- Experience in change management leadership
- Analytical and detail-oriented work habits
- Experience with institutional discounting and net tuition revenue forecasting (required); experience with institutional methodology and CSS Profile is preferred.
- Experience in financial aid at a four-year public or private not-for-profit college or university (required)
- Desire and ability to support and influence staff career development and appropriately recognize and acknowledge staff accomplishments
- Vision to forecast and plan long-term and ability to work with staff at a detailed level to carry out the vision
- Solid understanding of CRMs and student systems in the marketing, communication, and delivery of financial aid information; former experience in the implementation of a CRM or SIS is preferred
- Prior success in manual process conversion to automation, or experience in a highly automated environment is preferred
- Engagement in professional organizations, with involvement in organizational leadership or presentations preferred.

Location: The city of [Worcester, named the country's new "It" city by NPR in October 2018](#) is a robust, vibrant city that "combines the warmth of a small town with the convenience of a thriving city." Home to nine universities and 38,000 college students, it offers late-night diners, microbreweries, clubs, museums, concert venues, ethnic restaurants and theatres right down the hill from WPI in Worcester's vibrant downtown. The city maintains 53 parks, including the largest urban nature sanctuary in New England and the Olmstead-designed Elm Park. The Worcester Art Museum, located two blocks from campus, consists of 36 galleries and 5,000 years of art. The winter outdoors lover can access 22 ski trails at nearby Wachusett Mountain less than half-an-hour's drive. An

admirable mix of old and new residences, Worcester offers housing options and an overall cost of living that are more scaled to a mid-size city. Visit the [Worcester Cultural Coalition](#) to explore Worcester's diverse arts and cultural scene.

Worcester isn't technically the geographic center of New England, but it feels that way. Boston, Providence, Hartford, Springfield, and even New York City are within a short drive of Worcester, which is at the crossroads of several major routes, including interstates 90, 190, 290 and 395; and Routes 9, 20, and 146. Amtrak and MBTA rail services are available at the beautifully renovated Union Station to offer an alternative mode of transportation. For sports enthusiasts, Fenway Park, Gillette Stadium and the Basketball Hall of Fame are all within 50 miles. Starting in 2021, Worcester will be the new home to the Red Sox Triple-A affiliate the Worcester Red Sox (or "WooSox") and a new state-of-the-art 10,000-seat ballpark in the trendy Canal district. Cape Cod and Killington Ski Resort are less than 200 miles away.

To Apply: Napier Executive Search is assisting Worcester Polytechnic Institute in finding the right person for the next director of student aid and financial literacy. For more information, or to nominate someone for this role, contact Robin Reynders (robin.reynders@napiersearch.com) or Mary Napier (mary.napier@napiersearch.com). Interested candidates must submit 1) a letter of interest describing their unique qualifications for the Director of Student Aid and Financial Literacy paying specific attention to the roles and duties described in this posting; and 2) a résumé chronicling all work experiences. On a separate document from the résumé, candidates should provide the names, contact information, and a brief statement of the professional relationship of at least three professional references. For confidentiality, references will not be contacted without permission. All application materials should be submitted electronically to WPI@napiersearch.com by February 20, 2019. The preferred start time is early summer, 2019.

To enrich education through diversity, WPI is an affirmative action, equal opportunity employer.

