



CASE WESTERN RESERVE UNIVERSITY

Associate Director/Deputy Director for Financial Aid

The Associate Director/Deputy Director for University Financial Aid serves in a financial aid leadership role in the Division of Enrollment Management, and is responsible for providing standards and guidance that support the strategic goals of [Case Western Reserve University](#) and specifically the Office of University Financial Aid. CWRU seeks a seasoned financial aid professional to complement the skills of their accomplished Director of University Financial Aid and join their office of experienced staff in providing excellent service and access to CWRU students.

Enrollment Management Division and University Financial Aid

Case Western Reserve University enrolls 5,400 undergraduates and 6,500 graduate and professional students. In 2021, despite the pandemic, CWRU matriculated one of its largest first year undergraduate classes that was also one of its most diverse. Under the leadership and guidance of [Rick Bischoff, Vice President for Enrollment Management](#), the enrollment management division senior team is composed of four senior directors, including the Director of University Financial Aid, Dean of Undergraduate Admissions, Director of Enrollment Management Operations, and Director of Enrollment Management Marketing.

The Office of University Financial Aid holds fourteen administrative/staff personnel with the associate director / deputy director supervising a team of five. Utilizing all forms of federal, state, institutional and outside financial aid sources for undergraduate students, financial need is determined using the FAFSA and the CSS Profile. The University Financial Aid team processes over 20,000 first year financial aid applications annually. CWRU meets full demonstrated need for all admitted undergraduate students, using institutional methodology; and supports a significant merit scholarship program. Institutional financial aid is provided for international students. Graduate students are awarded grants and

scholarships by the academic departments, then combined with federal direct student loan eligibility by the University Financial Aid Office.

The Position

Reporting to the Director of University Financial Aid, the deputy director has responsibility for four major areas: 1) oversight of all student services staff and their work structures; 2) timely administration of federal, state and institutional student aid funding including packaging, disbursement, compliance, and reconciliation; 3) open communication with internal leadership and external constituents as it relates to providing information and recommendations on financial aid issues and enrollment management programs; and 4) maintaining strong working relationships with external colleagues within the financial aid industry.

Essential Functions

- Oversee the department's student service areas, including reception/welcome center, counseling services, and admitted student programs;
- Directly (and indirectly) supervise professional, support and student staff and ensure that staff provide efficient, consistent, and effective customer services to all levels of constituencies;
- Identify opportunities for office and process efficiencies and prepare and maintain functional manuals for the counseling staff;
- Provide oversight to ensure accurate and timely processing of financial aid applications in order to serve and attract a student body of the desired quality and quantity to attain the university's enrollment goals;
- Facilitate the effective processing of financial assistance and disbursement for all schools, departments and management centers throughout the University to support customer service goals;
- Plan and direct work structures for federal and state processes including reporting, disbursement and reconciliation of funding and these accounts; Plan and direct work structures to ensure that all deadlines are met internally for University purposes and externally as it relates to government entities, agencies and other organizations; Ensure the department's timely processing of all student refunds;
- Liaise with the Enrollment Operations team and coordinate with other operations and technical staff to support improved and enhanced processes and procedures for ongoing financial aid system maintenance;
- Provide recommendations and solutions to enhance an automated financial aid process;
- Create and analyze forecasting models, along with other office and enrollment management leadership, to project student and parent needs for financial assistance;
- Maintain the 'Federal Participation Agreement' for Case Western Reserve University to ensure Title IV funding, and complete all appropriate reporting and application preparation to meet federal, state, local and institutional aid programs;

- Collect financial aid data for high-level surveys and reports that represent the University nationwide;
- Prepare and review all web content for student financial assistance, including the design and set up of the student (undergraduate and graduate) portal and application process, Net Partner;
- Act as a liaison to appropriate University committees and participate and/or obtain memberships in professional organizations; Maintain a network of professionals to share and learn best practices and /or developments within the financial aid discipline.

Contacts

- Department: Daily contact with the Director, Vice President for Enrollment Management, colleagues, and supervision of staff to ensure strategic goals are being met;
- University: Daily contact with administrators, faculty, and staff providing feedback and program direction to ensure compliance;
- External: Contact with government agencies, vendors, colleagues, professionals as well as daily contact with families and parents to provide information and direction regarding regulations and application process;
- Students: Daily contact with students explaining financial aid programs and application processes.

Skills, Qualifications and Characteristics

CWRU is seeking candidates with at least 8 years of progressive experience in financial aid administration and demonstrated system analysis in a financial discipline. A Bachelor's degree is required; and an advanced degree is preferred. In addition, they should possess the following:

- Expertise in state, federal, and institutional financial aid programs and compliance;
- Experience with institutional needs analysis methodology and CSS Profile strongly preferred;
- PowerFAIDS experience strongly recommended;
- Supervisory experience and management strength;
 - A positive, open, inclusive approach to staff and team management;
 - Patient and understanding with a sense of humor in a fast-paced, hard-working environment;
 - Respect for individual staff strengths and ideas, with an emphasis on training and professional development;
- Collaborative approach with internal and external partners;
- Knowledge in information technology as it relates to developing financial systems and technical sleuthing and problem-solving, including proficiency with Microsoft Office, knowledge of Slate, and exposure to PowerFAIDS and Peoplesoft;
- Ability to handle significant deadline and programmatic pressures in a high volume office with a major impact on the University, recruitment, cash flow, and federal appropriations;

- Excellent written and oral communication skills with the ability to enhance published enrollment and financial aid marketing materials;
- Commitment to customer service for all University students and their families;
- Demonstrated understanding of CWRU's work on providing an inclusive experience for all students;
- Skills to serve as a creative and flexible thought partner within the Enrollment Management division and University Financial Aid office.

The University

[Eric W. Kaler](#) became the 11th president of Case Western Reserve University on July 1, 2021. Case Western Reserve University is located in Cleveland, Ohio, in [University Circle](#), Ohio's most spectacular square mile home of more than 40 cultural, medical, educational, religious, and social service institutions. CWRU holds membership in the Association of American Universities, an international organization of leading research universities devoted to maintaining [a strong system of academic research and education](#).

The CWRU history is a rich and fascinating story of Western Reserve College, 1826, and Case School of Applied Science, 1880, collaborating, relocating, creating the beginnings of University Circle, and finally merging into a university federation in 1967, worthy of national distinction. As a complete university in 1992, Case Western Reserve University immediately became a leading institution for academics and research, as well as one of the nation's top-ranked universities. Today the University thrives on collaboration across academic and administrative divisions and partnerships with dozens of other institutions, including its neighbors in University Circle.

Case Western Reserve University is comprised of eight schools and one college: Case School of Engineering; College of Arts and Sciences; Frances Payne Bolton School of Nursing; Jack, Joseph and Morton Mandel School of Applied Social Sciences; School of Dental Medicine; School of Graduate Studies; School of Law; School of Medicine; and Weatherhead School of Management.

Case Western Reserve students conduct groundbreaking work, starting in their first year on campus. From medicine to management, music to mathematics, faculty, staff and students inquire, explore, study and discover. They are driven to expand knowledge, deepen understanding and, when possible, contribute to the well-being of individuals, organizations and society at large.

Undergraduate students can participate in a number of traditional and online programs, choose from over 100 majors, and have over two hundred recognized student clubs and organizations in which to engage. As Spartans, student athletes participate in 17 NCAA Division III sports.

Graduate or professional, postdoc or research associate—three out of every five Case Western Reserve students are working toward advanced degrees from top-ranked programs in engineering, medicine, law, dentistry, social work, business, arts and sciences.

Location

Case Western Reserve University's community has unparalleled proximity to high quality city events and living. Located in the vibrant neighborhood of University Circle, just minutes from downtown Cleveland, CWRU is surrounded by more than 50 arts, cultural, educational, health and human service institutions. Case Western Reserve University is the only independent, research-oriented university in a region bounded by Pittsburgh and Rochester on the east, Nashville on the south, and Chicago on the west. From its first-rate museums and outstanding destinations - Cleveland Orchestra at Severance Hall, Cleveland Museum of Art, Cleveland Botanical Garden, Museum of Contemporary Art Cleveland or Cleveland Museum of Natural History, to name a few - to its professional sports teams, to its nearby residential neighborhoods with a great variety of shopping and dining ([Little Italy](#), [Cleveland Heights](#) and [Shaker Heights](#)), Cleveland is an exciting place to live, work and play. Dozens of the country's best medical centers are located in Cleveland, including Cleveland Clinic, MetroHealth and University Hospitals of Cleveland. Find out [the best things to do in Cleveland](#).

To Apply

[Napier Executive Search](#) is assisting Case Western Reserve University to find the Associate Director / Deputy Director for University Financial Aid. To arrange for a confidential conversation or to nominate a candidate for this position, please contact Robin Reynders (Robin.Reynders@napiersearch.com) or Mary Napier (Mary.Napier@napiersearch.com). To apply, please send a resume, a detailed letter of interest, and contact information for three professional references by email to: CWRU@napiersearch.com. For assurance of full consideration, submit application materials no later than October 6, 2021. Resumes will be reviewed until the position is filled. All applications and nominations will be considered confidential and notice will be given before references are contacted.

In employment, as in education, Case Western Reserve University is committed to Equal Opportunity and Diversity. Women, veterans, members of underrepresented minority groups, and individuals with disabilities are encouraged to apply.

