



Portland State  
UNIVERSITY



POSITION PROFILE

Director of Financial Aid & Scholarships

September 2024





## PORTLAND STATE UNIVERSITY

Portland State University (PSU) is Oregon’s largest urban university, located in Portland, Oregon. PSU enrolls over 22,000 students and offers programs for bachelor’s, master’s, and doctoral degrees. PSU is an internationally recognized university known for excellence in student learning, innovative research, and community engagement. PSU contributes to the economic vitality, environmental sustainability, and quality of life in the Portland region and beyond. Employees describe Portland State University as a vibrant, diverse, progressive place to work and an environment that welcomes process improvement and innovation. Portland State’s 50-acre downtown campus is located in the heart of the city; a hub of culture, business, and technology, and just 90 minutes from mountains and the Oregon Coast.

Portland State is composed of 10 constituent schools and colleges, offering undergraduate degrees in 123 fields and postgraduate degrees in 117 fields. Schools at Portland State include: The School of Business, College of Education, School of Social Work, College of Urban and Public Affairs, College of the Arts, College of Liberal Arts and Sciences, Maseeh College of Engineering and Computer Science, the joint OHSU/PSU School of Public Health, the Graduate School, and the Honors College. The athletic teams are known as the [Portland State Vikings](#) and compete at the NCAA Division I Level, primarily in the [Big Sky Conference](#). See [www.pdx.edu](http://www.pdx.edu) for additional information about the institution.

Portland State University is committed to providing access and excellent education to students from all backgrounds.

- PSU is a national [College of Distinction](#), a mark of excellence earned for its pioneering University Studies program, a four-year pathway to undergraduate success.
- U.S. News & World Report ranks PSU as the [No. 1 school in Oregon for social mobility](#) due to the institution graduating the highest number of economically disadvantaged students and No. 1 in Oregon for Service Learning.
- PSU was among the first universities in the country to garner the [community engagement classification](#) from the Carnegie Foundation in 2006 and has just been recognized again for its exceptional commitment.
- Portland State has been named by Newsweek as one of [America’s Greatest Workplaces for Diversity for 2024](#).
- For the second year in a row, PSU has received the [Higher Education Excellence in Diversity \(HEED\) Award](#) from INSIGHT Into Diversity magazine.
- In 2022, PSU became an [emerging Hispanic Serving Institution \(HSI\)](#), and in fall 2023 received a [five-year grant under its Asian American Native American Pacific Islander Serving Institution \(AANAPISI\) designation](#).
- PSU recently joined more than 300 institutions nationwide as part of the [College Cost Transparency Initiative](#), making it easier for students and families to navigate the financial aid process.

As President Ann Cudd recently remarked, “PSU is truly an anchor institution: We are a powerhouse for education and the arts in this region. We are woven into the fabric of this city. We are an innovative hub of research, much of it trained on addressing Oregon’s current and future challenges. And our students — our wonderful, creative, and passionate students — will take their education out into the community and make lasting change.”

## LEADERSHIP



### **Dr. Ann E. Cudd**

President Ann E. Cudd joined Portland State in August of 2023, bringing with her an immense amount of energy and focus on the mission and values of Oregon’s urban research university. She came to the president’s office as an accomplished academic leader and philosophy scholar whose research explores themes of oppression, economic inequality, capitalism and gender. Cudd came to Portland from western Pennsylvania where she served as Provost and Senior Vice Chancellor of the 34,000-student, five-campus University of Pittsburgh from 2018 to 2023. During her tenure at Pitt, applications increased by 60% and Cudd was instrumental in the university offering enhanced financial aid through the Pitt Success Pell Match, similar to PSU’s Tuition-Free Degree Program. She is a proven champion of racial justice and equity initiatives, including the development of an online course for incoming students on racism in America. Cudd holds three advanced degrees from the University of Pittsburgh, including a doctorate of philosophy and master’s degrees in philosophy and economics. She also holds a bachelor’s degree in mathematics and philosophy

from Swarthmore College. She has held faculty positions at the University of Kansas, Occidental College, Boston University, and the University of Pittsburgh.

Dr. Cudd, the second woman to serve as PSU’s president in its 76-year history, said her initial priorities include restoring the University’s downtown campus vitality. Dr. Cudd is keen to ensure that the University plays an active role in the city of Portland’s revival, using the example of the city’s current charter reform process and suggesting ways that PSU can act as a convener of citizens and experts to help inform and shape that effort. Getting more students to enroll at Portland State is also high on her list. “There is a national challenge in re-engaging potential students, especially among low-income and first-generation students, with higher education,” she said. “PSU is perfectly positioned to turn that around.”



### **Dr. Chuck Knepfle**

Dr. Chuck Knepfle has worked in higher education for over 30 years and currently serves as the Vice President for Enrollment Management at Portland State University. His background – and passion – is in student access, having served as the financial aid director at both Miami University in Ohio and at Clemson University in South Carolina. During his career he has created scholarship programs focused on diversity recruitment as well as need-based aid for students who identify as low socioeconomic status. At Portland State Dr. Knepfle led the effort to expand access to the Tuition Free Degree program. Under his leadership, new first-time student applications for admission to PSU have increased 25%. Access to higher education for all students, regardless of race or income, was the focus of his doctoral research. An experienced leader in financial aid and enrollment management, Dr. Knepfle regularly contributes to [national conversations](#) about expanding access to higher education. He holds a B.S. in systems analysis, an M.B.A. in management from Miami University, and a Ph.D. in higher education leadership from Clemson University.

# THE OFFICE OF STUDENT FINANCIAL AID AND SCHOLARSHIPS

The Office of Student Financial Aid and Scholarships serves prospective and continuing students along with students who have left the University by guiding them through the process of applying for and maintaining financial aid and scholarships and management of loans. Along with the [Office of Undergraduate Admissions](#), the [Office of Student Financial Aid and Scholarships](#) is housed within the [Office of Enrollment Management](#).

PSU offers students a [Financial Wellness Center](#) designed to give all students the tools and resources needed to empower them to make healthy financial decisions through education, awareness, and mentoring. It provides one-on-one financial coaching regarding individual student accounts, re-enrollment, resolving debt owed to PSU, understanding the cost of a degree, creating a sustainable budget, repairing credit, and repaying student loans.

Last year, PSU joined more than 300 institutions nationwide in joining the [College Cost Transparency Initiative](#), which is organizing an effort to standardize financial aid offers and ensure award information is transparent and easy to understand. This recent development will make navigating financial aid at Portland State even easier for students and their families.

In August 2024, Portland State also received a \$7.8 million U.S. Department of Education Grant to fund an initiative called Access, Connect, Complete, Engage (ACCE). ACCE will specifically provide transfer advising, academic coaching, and financial aid to Mount Hood and Clackamas Community College students who declare an intention to transfer to a four-year college, as well as students who are first-generation, low-income or come from other marginalized backgrounds. Portland State is planning to launch the ACCE program at both Mount Hood and Clackamas community colleges, with an initial goal of serving 2,000 transfer students in January 2025.





## THE POSITION

### Director of Financial Aid and Scholarships

Reporting to the Vice President for Enrollment Management, the Director is responsible for the overall management of the Office of Student Financial Aid and Scholarships. This includes, but is not limited to funds management, federal, state and local reporting, policy development and analysis, scholarship administration, compliance oversight, and processing operations. This position will direct administration and compliance of \$220 million on an annual basis in federal, state, and institutional aid and scholarships. The Director will promote staff development and strive to enhance and cultivate a culture that promotes student success, a positive public relations image for Portland State University for students, parents, contributors and community members. Serving as a member of the Enrollment Management Leadership Team this position works collaboratively with the colleges/schools, athletics, advancement, other enrollment management departments, and other administrative and student services departments. The Student Financial Aid and Scholarships Office is comprised of a team of 23 staff, 10-15 student employees and an annual operating budget of \$2.1 million.

#### JOB RESPONSIBILITIES

##### Office of Student Financial Aid and Scholarships Leadership

- Plan, develop, and administer an annual budget to maximize the effectiveness of the Financial Aid Office to students and the campus community.
- Conduct review, planning, and implementation over all aspects of the financial aid operations.
- Direct the implementation of technological improvements for efficiency.
- Create and lead the implementation of strategies to enhance student service and raise the profile of the Financial Aid Office on campus and within the community.

##### Compliance

- Monitor compliance with Federal and State regulations as well as institutional policies and procedures.
- Ensure that the policy and procedure manual is up to date.
- Guide staff in the development of policies and procedures to ensure compliance.
- Interpret internal, State and Federal audits, program reviews, accreditation guidelines and other evaluations.
- Implement changes to ensure compliance.
- Provides information to colleagues, team members and staff about any changes to legislation and regulations.

### **Program Development/Management**

- Work with Enrollment Management leadership to develop a packaging philosophy that embodies the institutional mission regarding access, recruitment, recognition, retention and accountability.
- Direct the systematic and equitable distribution of financial aid resources.
- Administer a consistent and compassionate financial aid appeals process.
- Ensure external outreach and all communication materials are consistent and of the highest quality.

### **Staff Development and Customer Service**

- Create opportunities for staff to grow personally and professionally in their positions.
- Ensure that the job classifications are consistent and that staff communicate professionally with colleagues throughout the University.
- Ensure staff receive regular and accurate feedback, are well trained, and have their concerns heard and addressed.
- Encourage staff to participate in trainings, seminars, conferences and meetings.
- Ensure all policies and decisions are made through a lens of customer service towards students.
- Participate on various University committees and workgroups to define and develop institutional goals regarding financial aid issues.
- Advise the University leadership, Enrollment Management Leadership Team, and other senior level administrators on financial aid issues.

### **REQUIRED QUALIFICATIONS**

- Bachelor's degree from a regionally accredited institution.
- Three to five years of successful experience in Financial Aid at the Director or Associate Director level.
- Demonstrated leadership of a diverse unit of financial aid and scholarship professionals.
- Prior responsibility for audit management, program certification, and ensuring compliance.
- Experience with automated disbursement and tracking through Financial Aid software and knowledge of current applications.

### **Preferred Qualifications**

- Graduate degree.
- Financial Aid leveraging and modeling experience.
- Scholarship administration experience.
- Ellucian Banner experience.





## INQUIRIES, NOMINATIONS AND APPLICATIONS

Confidential review of applications will begin immediately and continue until the position is filled. **Applications will be reviewed as they come in. Those received by November 5, 2024 will be given first consideration.**

**To apply, go to <https://theapplicantmanager.com/jobs?pos=su427>.** Applicants must submit a CV, a letter of interest that details their related qualifications and vision for the role, as well as a statement (one page maximum) that describes their commitment to equity, diversity, and inclusion personally and/or professionally.

### **For more information or to offer recommendations or nominations:**

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*Portland State University is an affirmative action/equal opportunity employer and seeks candidates who are committed to the highest standards of scholarship and professional activities and a campus climate that supports equality, diversity, and inclusion.*



**Summit Search Solutions, Inc.** is a boutique executive search firm dedicated to serving the education and nonprofit sectors nationwide. Summit has a team of experienced recruiting consultants in strategic locations across the country including California, Colorado, Kansas, Maryland, New York, and North Carolina.



## ABOUT PORTLAND, OREGON

Big city excitement and small-town charm make Portland one of the most popular cities on the west coast. Situated approximately 70 miles from the Pacific Ocean where the Columbia and Willamette Rivers meet, Portland enjoys a magnificent setting, combining sparkling waterways with lush greenery rarely found in urban settings. The Portland metro area is home to approximately 2.35 million residents. Portland is widely recognized in national surveys and rankings as one of America's most livable cities.

Portland's historic old town, many galleries and museums, Saturday Market, Waterfront Park and an abundance of fine restaurants keep residents and visitors busy and satisfied. The performing arts in the area offer classical music, jazz, and blues as well as theater and dance. Portland is just a short distance from the spectacular Columbia Gorge and Multnomah Falls, windsurfing at Hood River, valley wineries, skiing at Mt. Hood, and the drama of the Oregon coast.

Portland is known for its extensive park system of more than 200 parks. These encompass such areas as the elm-shaded South Park Blocks in the downtown area and Washington Park, home of the International Rose Test Garden and a Japanese Garden. Portland's Forest Park, over 5,000 acres, is the largest park within a city in the U.S. and has nearly 80 miles of walking trails.

Portland's award-winning mass transit system is one of the most extensive and advanced in the U.S. and includes buses and the MAX, an urban light rail line, as well as a downtown transit mall.

*To learn more about Portland and surrounding areas:*

*Information about Portland, OR: <https://www.travelportland.com/>  
Portland Regional Chamber of Commerce: <https://www.portlandregion.com/>  
City of Portland, OR: <https://www.portlandoregon.gov/>*

