SOFO Financial Assistant

**POSITION DESCRIPTION**

SOFO Financial Assistants help student group leaders initiate the financial transactions that support their group’s activities. They do this by working with the group leaders to review the documents that support the transaction requests and processing them once they are complete.

Gain a very good understanding of financial concepts/processes, as well as valuable transferable skills in customer service, teamwork, and office functions and technologies. No financial experience is necessary to apply.

**HUMAN RESOURCES DETAILS**

- **Work Study Applicable**
- **Shifts:** Monday through Friday – 9 a.m. to 5 p.m.
- **Starting Wage:** $12.00/hour
- **Reports to:** SOFO Student Supervisor, SOFO Staff Assistant, and SOFO Supervisor

**ESSENTIAL FUNCTIONS**

SOFO Financial Assistants report directly to the SOFO administrative team, comprised of the SOFO Manager, the SOFO Supervisor, and the SOFO Student Supervisors. Duties include: providing front line customer service to student organization officers; offering preliminary screening of transaction requests and their supporting documentation; and the shepherding of transactions to completion. Financial Assistants serve as informational resources—focusing on SOFO policies, procedures and best practices—for student leaders and their staff advisors. Responsibilities include filing, check processing, data entry, and assisting group treasurers in balancing their organization ledger books quarterly. Other duties may be assigned by the SOFO Manager, SOFO Supervisor, or Student Supervisors.

Financial Assistants are required to attend regular meetings with entire SOFO staff. Financial Assistants are expected to participate in a paid fall training program for all Norris student employees. They are subject to quarterly reviews by the SOFO Student Supervisors and evaluations and learning assessments by the SOFO Supervisor or SOFO Manager.

**MINIMUM SKILLS AND QUALIFICATIONS**

- Current Northwestern University undergraduate student
- Customer service
- Attention to detail
- Ability to multi-task
- Reliable, organized, and good interpersonal skills
- Computer knowledge a must
OUTCOME EXPECTATIONS AND RESPONSIBILITIES

CUSTOMER SERVICE

Customer Interaction – articulates clearly and listens to customers, maintains good eye contact and focuses on individual customer, and puts the customer first
  o Greets customers as soon as they arrive to service window
  o Maintains professional and positive attitude during a transaction

Presentation – positive image and reflection of self and the Norris Center
  o Wears nametag during shift and is well groomed
  o Service area must be clean and organized

Customer Satisfaction – follows through with customers in order to meet their expectations for service, and is persistent and creative in meeting customer needs
  o Be easily approachable to clients and fellow Norris Staff at service window
  o Be articulate when answering office phone line
  o Going above and beyond customer expectation especially with non-related SOFO questions

RESPONSIBILITY

Attendance – arrives on time for shifts, works during scheduled hours and makes arrangements for replacements as needed
  o Maintains and follows personal schedule and makes adjustments accordingly.
  o Always make sure to swipe in with wildcard and to sign attendance sheet
  o To attend quarterly SOFO meetings as needed
  o To attend Norris training program
  o Student Supervisor- Meets monthly with the Cash operations areas supervisors regarding areas

Accuracy – is precise and works within allotted time frames, acknowledges when mistakes or missed deadlines occur and notifies supervisor appropriately
  o Completes tasks as assigned in a timely manner meeting all expectations.
  o Verifies work before posting transactions
  o Checks organization’s account status before making recommendations
  o Consults SOFO Policies and Procedures and with the SOFO Administrative team frequently to ensure that he/she is aware of any changes to them

Accountability – makes appropriate decisions regarding behavior, recognizes and accepts consequences of actions, and acts in a dependable manner
  o Contacting the appropriate student officers when finding an error on documentation after it has been accepted

Job Knowledge – knows job description and understands what the job entails, knows relevant information and policies, and seeks clarification when needed
  o Review and comprehend SOFO policies and procedures
  o Review and comprehend SOFO staff handbook (power point presentation)
  o Understand basic accounting principles
  o Understands office security
  o Asks questions and provides feedback to better develop personal knowledge
  o Possesses general knowledge of Norris University Center functions and layout
  o Knows the hierarchy of the Norris Business Operations department and the administrators to contact if the SOFO Financial Coordinator and SOFO Assistant are unavailable
  o Has perspective of the SOFO Attendant role as it relates to the Norris University Center mission

TEAMWORK

Communication – communicates information to team members, customers, and team leadership, and displays ability to adjust communication style appropriately
  o Reviews issues log for recommendations given regarding insufficient documentation reviewed at service window
  o Writes issues log clearly and concisely for staff members to understand
  o Reviews emailed log for messages sent to group officers with recommendations needed in order to process checks

Group Participation – attends team meetings and contributes to dialog, and supports others and
appropriately adapts behavior in response to team needs
  o Effectively contributes during meetings, sessions, and events
  o Acts as a team player who collaborates, cooperates, and communicates openly and productively

Values Difference – relates well with team members from diverse backgrounds, interests, and values, and understands, recognizes and behaves appropriately when cultural differences exist
  o Sensitive to diverse and varying needs of all student groups and staff

LEADERSHIP
  Empowerment – recognizes individual and group contributions, and celebrates accomplishments and encourages others to act and make decisions
    o Ability to acknowledge and support others’ personal accomplishments

AUTONOMY
  Enforcement of Policies – uses and upholds rules and guidelines of job, and makes appropriate exceptions when the situation calls for it
    o Consistent when relaying SOFO policies and procedures to student officers and group advisors
    o Understand and comprehend Norris Policies

  Initiative – demonstrates ability to initiate action and contribute ideas to improve area, and works well with minimal supervision
    o Ability to complete all tasks without constant supervision
    o Contributes ideas to improve office operations and assists in the implementation of new policies and initiatives

  Decision Making – displays ability to make good choices, and understand how to use his or her talents and skills to best accomplish tasks
    o Capable of providing answers for student officers or Norris visitors when supervisors are unavailable
    o Assists in the interviewing, hiring, training, and disciplining of work study staff

  Problem Solving – deals with unforeseen situations professionally, and is adaptable, flexible, and able to work under conditions of ambiguity
    o Ability to answer Norris visitors’ questions not related to SOFO