

## **DIRECTOR, FINANCIAL AID**

### **DEFINITION**

Under administrative direction, plans, organizes, manages, and provides administrative direction and oversight for all functions and activities of the Financial Aid Department, including State and Federal programs, veterans administration, scholarships, and other student financial assistance programs; coordinates assigned activities with other District departments and divisions to meet student needs and ensure smooth and efficient operations; serves as key point of contact for Federal regulations and compliance regarding Title IV and Higher Education Act provisions; provides highly responsible and complex professional assistance to the Vice President, Student Services in areas of expertise.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives administrative direction from the Vice President, Student Services. Exercises general direction and supervision over supervisory, professional, technical, and administrative support staff.

### **CLASS CHARACTERISTICS**

This is a Department Director classification that oversees, directs, and participates in all activities of the Financial Aid Department, including short- and long-term planning and development and administration of departmental policies, procedures, and services. This class provides assistance to the Vice President, Student Services in a variety of administrative, coordinative, analytical, and liaison capacities. Successful performance of the work requires knowledge of education policy and District functions and activities and the ability to develop, oversee, and implement projects and programs in a variety of areas. Responsibilities include coordinating the activities of the department with those of other departments, divisions, and outside agencies and managing and overseeing the complex and varied functions of the department. The incumbent is accountable for accomplishing departmental planning and operational goals and objectives and for furthering District goals and objectives within general policy guidelines.

### **EXAMPLES OF ESSENTIAL FUNCTIONS (Illustrative Only)**

- Assumes full management responsibility for all Financial Aid Department programs, services, and activities, including State and Federal programs, veterans administration, scholarships, and other student financial assistance programs.
- Develops, directs, and coordinates the implementation of goals, objectives, policies, procedures, and work standards for the department; establishes, within District policy, appropriate budget, service, and staffing levels.
- Manages and participates in the development and administration of the department's annual budget; directs the forecast of additional funds needed for staffing, equipment, materials, and supplies; directs the monitoring of and approves expenditures; directs and implements adjustments as necessary.
- Selects, trains, motivates, and directs department personnel; evaluates and reviews work for acceptability and conformance with department standards, including program and project priorities and performance evaluations; works with employees on performance issues; implements discipline and termination procedures; responds to staff questions and concerns.
- Contributes to the overall quality of the department's service by developing, reviewing, and implementing policies and procedures to meet legal requirements and District needs; continuously monitors and evaluates the efficiency and effectiveness of service delivery methods and procedures; assesses and monitors the distribution of work, support systems, and internal reporting relationships; identifies opportunities for improvement; directs the implementation of change.
- Plans, organizes, manages, and directs the distribution, collection, review, and evaluation of student financial aid forms and applications; coordinates activities to ensure proper determination of student

- eligibility for financial aid programs; ensures proper comparison of individual financial needs with available aid; directs and participates in awarding of financial aid to eligible students.
- Directs and participates in the preparation and maintenance of a variety of narrative, financial, and statistical reports, records, and files related to funds, students, awards, accounts, income, expenditures, and budgets; ensures mandated reports are completed and submitted to appropriate personnel or governmental agencies according to established timelines.
  - Coordinates, directs, and participates in a variety of activities to ensure proper and timely resolution of financial aid issues, conflicts, and discrepancies; reviews, evaluates, determines, and implements appropriate responses to student appeals and loan requests.
  - Assists in adjudicating disputes related to student complaints regarding receipt of funds or benefits.
  - Represents the District to state and federal agencies regarding compliance issues.
  - Prepares applications related to the District's eligibility to receive state and federal funds.
  - Serves as key point of contact for federal regulations and compliance regarding Title IV, Higher Education Act, and veterans services provisions; prepares for and responds to external and internal audits related to financial aid programs.
  - Directs and participates in a variety of activities involved in researching, securing, and maintaining appropriate public and private sources of student assistance funding.
  - Maintains close working relationship with the Foundation and Fiscal Services to monitor and accurately disburse funds to students.
  - Maintains close working relationship with information technology staff and managers by providing technical expertise related to programming and implementation of financial aid technology.
  - Coordinates with information technology in the development, implementation, and upgrade of application systems within the department.
  - Compiles and analyzes statistical data and conducts surveys to identify trends and develop strategies for enhancing planning related to financial aid, veterans, and scholarship programs and services.
  - Coordinates assigned programs and services with other District departments and divisions to establish financial aid processes and procedures reflective of District goals.
  - Advises, provides guidance, and prepares and delivers presentations on issues pertaining to financial aid programs and services to senior and executive level management.
  - Attends and participates in professional group meetings and various District committees and advisory groups; stays abreast of new trends and innovations in the field of financial aid programs and services as they relate to the area of assignment.
  - Maintains and directs the maintenance of working and official departmental files.
  - Monitors changes in laws, regulations, and technology that may affect District or departmental operations; implements policy and procedural changes as required.
  - Prepares, reviews, and presents staff reports, various management and information updates, and reports on special projects as assigned by the Vice President, Student Services.
  - Responds to difficult and sensitive public inquiries and complaints and assists with resolutions and alternative recommendations.
  - Learns and applies emerging technologies and, as necessary, to perform duties in an efficient, organized, and timely manner.
  - Provides a working and learning environment that is free from prohibited discrimination, harassment and retaliation (DHR), and provided by applicable law and District policies. Attends District mandated DHR training and participates in DHR investigations as directed. Prevents discrimination and harassment and retaliation against individuals who bring these complaints forward through recognizing and reporting possible incidents to the Director of Equal Employment Opportunity Programs in Human Resources.
  - Performs other related duties as assigned.

## **QUALIFICATIONS**

### **Knowledge of:**

- Administrative principles and practices, including goal setting, program development, implementation, and evaluation.
- Budget development, administrative practices, and organizational and management practices as applied to the analysis and evaluation of projects, programs, policies, procedures, and operational needs.
- Principles and practices of employee supervision, including work planning, assignment, review and evaluation, and the training of staff in work procedures.
- Principles, practices, and techniques of financial aid programs and services.
- Applicable Federal, State, and local laws, regulatory codes, ordinances, and procedures relevant to financial aid programs, projects, and operations.
- Methods and techniques for the development of presentations, business correspondence, and information distribution; research and reporting methods, techniques, and procedures.
- Principles and procedures of record keeping, technical report writing, and preparation of correspondence and presentations.
- Modern office practices, methods, and computer equipment and applications.
- English usage, spelling, vocabulary, grammar, and punctuation.
- Techniques for effectively representing the District in contacts with governmental agencies, community groups, and various business, professional, educational, regulatory, and legislative organizations.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, students, and District staff, including individuals of various ages, disabilities, various socio-economic and ethnic groups.

### **Skills & Abilities to:**

- Develop and implement goals, objectives, policies, procedures, work standards, and internal controls for the department and assigned program areas.
- Provide administrative and professional leadership and direction for the department and the District.
- Prepare and administer large and complex budgets; allocate limited resources in a cost effective manner.
- Interpret, apply, explain, and ensure compliance with applicable Federal, State, and local policies, procedures, laws, and regulations.
- Plan, organize, direct, and coordinate the work of professional and technical personnel; delegate authority and responsibility.
- Select, motivate, and evaluate the work of staff and train staff in work procedures.
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
- Effectively administer a variety of financial aid programs, projects, and administrative activities.
- Effectively represent the District and the department in meetings with various educational, business, professional, regulatory, and legislative organizations.
- Prepare clear and concise reports, correspondence, policies, procedures, and other written materials.
- Conduct complex research projects, evaluate alternatives, make sound recommendations, and prepare effective technical staff reports.
- Establish and maintain a variety of filing, record keeping, and tracking systems.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.

- Understand scope of authority in making independent decisions.
- Review situations accurately and determine appropriate course of action using judgment according to established policies and procedures.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

**Education and Experience:**

*Any combination of training and experience which would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

Equivalent to graduation from a regionally accredited four-year college or university with major coursework in finance, accounting, business or public administration, counseling, education, or a related field, and five (5) years management and/or administrative experience in a college financial aid office.

**Licenses and Certifications:**

- Possession of, or ability to obtain, a valid California Driver's License by time of appointment.

**PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various District and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 20 pounds.

**ENVIRONMENTAL ELEMENTS**

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with staff, students, and/or the public in interpreting and enforcing departmental policies and procedures.