

## **MANAGER, FINANCIAL AID AND SPECIAL PROGRAMS**

### **DEFINITION**

Under general direction, plans, directs, administers, supervises, and participates in the daily operations and activities of financial aid, scholarship, and veterans services programs in the Financial Aid Department; plans, organizes, and coordinates the development and implementation of assigned programs and services; provides responsible technical assistance to the Director, Financial Aid; performs a variety of technical tasks relative to the assigned functional area.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives general direction from Director, Financial Aid. Exercises direct and general supervision over assigned staff.

### **CLASS CHARACTERISTICS**

This is a management level class in the financial aid functional area that exercises independent judgment on diverse and specialized financial aid, scholarship, veteran services, and other student support services functions and has significant accountability and ongoing decision-making responsibility associated with the work. The incumbent organizes and oversees day-to-day financial aid activities, reporting, and record keeping and is responsible for providing professional-level support to the Director, Financial Aid in a variety of areas. Responsibilities include oversight of various financial aid and outreach programs, projects, and activities, in addition to budget and report preparation activities. This class is distinguished from the Assistant Director, Financial Aid in that the latter assists the Director in providing overall responsibility for all functions for the Financial Aid Department.

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

- Plans, organizes, assigns, supervises, and reviews the work of assigned staff in the Financial Aid Department; trains staff in work procedures; provides policy guidance and interpretation to staff; evaluates employee performance and works with employees to correct deficiencies; recommends and implements disciplinary procedures; assists in selection and promotion.
- Recommends and implements goals, objectives, policies and procedures, and changes to applicable Federal, State, local, and District regulations; establishes schedules and methods for assigned financial aid functions.
- Monitors services and activities of assigned programs and functional areas within the Financial Aid Department; identifies opportunities for improving service delivery methods and procedures; provides recommendations concerning process changes; reviews with appropriate management staff; implements improvements.
- Determines and recommends staffing needs for assigned programs, services, projects, and activities; participates in annual budget preparation; prepares detailed cost estimates; maintains a variety of records and prepares routine reports of work performance.

- Assists in developing, evaluating, and modifying programs and services designed to ensure students' access to financial aid and financial aid assistance.
- Participates in the development and implementation of marketing and advertising strategies to promote assigned programs, projects, and services; plans and coordinates assigned financial aid program workshops, presentations, information sessions, ceremonies, and events.
- Develops relationships with local high schools and community organizations; serves as primary point of contact for members of the local community and school districts regarding District financial aid programs and services.
- Researches and analyzes program data; prepares comprehensive technical records and reports; implements findings and takes corrective action, as necessary.
- Works with State and Federal auditors on compliance surveys and findings.
- Prepares and presents various reports and other necessary correspondence; supervises the preparation and maintenance of related reports, records, and files; ensures the proper documentation of activities.
- 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; researches emerging products and enhancements and their applicability to District needs.
- Monitors changes in regulations and technology that may affect assigned functions and operations; implements policy and procedural changes after approval.
- Receives, investigates, and responds to difficult and sensitive problems and complaints in a professional manner; identifies and reports findings and takes necessary corrective action.
- 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:**

- Principles and practices of employee supervision, including work planning, assignment, review and evaluation, discipline, and the training of staff in work procedures.
- Principles and practices of financial aid program development and administration.
- Applicable Federal, State, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Basic principles and practices of budget program development, administration, and accountability.
- Research and reporting methods, techniques, and procedures.

- Modern office practices, methods, and computer equipment and applications related to the work.
- Record keeping principles and procedures.
- 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, students, and District staff, including individuals of various ages, disabilities, various socio-economic and ethnic groups.

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

- Assist in developing and implementing goals, objectives, practices, policies, procedures, and work standards.
- Supervise, train, plan, organize, schedule, assign, review, and evaluate the work of staff.
- Organize, implement, and direct financial aid programs, services, projects, and activities.
- Interpret, apply, explain, and ensure compliance with applicable Federal, State, and local policies, procedures, laws, and regulations.
- Identify problems, research and analyze relevant information, and develop and present recommendations and justification for solution.
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
- Prepare clear and concise reports, correspondence, procedures, and other written materials.
- Establish and maintain a variety of manual and computerized files, record keeping, and project management systems.
- Make sound, independent decisions within established policy and procedural guidelines.
- 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 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 education, counseling, or related field and five (5) years of directly related experience with financial aid programs or related student services programs, including two (2) years of lead or supervisory experience.

### **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 occasionally work outdoors for assigned events and be exposed to loud noise levels, cold and/or hot temperatures, and dust, fumes, and allergens. Employees may interact with staff, students, and/or the public in interpreting and enforcing departmental policies and procedures.