



## Director, Financial Aid and Scholarships

Management Range: I 8

Board Approved: 08/11/2022

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*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job; however, any additional duties will be reasonably related to this class.*

### **SUMMARY DESCRIPTION**

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Under general direction, plans, directs, and administers a comprehensive financial aid program that includes federal, state, and local aid, grants, scholarship, outreach services, loans, and other types of financial assistance.

### **REPRESENTATIVE DUTIES**

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*The following duties are typical for this classification.*

1. Develops institutional financial aid and scholarship policy, philosophy, standards, and procedures in support of institutional goals and in compliance with applicable regulations.
2. Coordinates and directs the various activities of a designated financial aid office and staff.
3. Provides current updated information about financial aid programs; requirements for financial aid eligibility such as unit requirements, academic standing student loan default.
4. Maintains Title IV Participation Agreement with the U.S. Department of Education; submits new programs for approval of funding and ensures compliance with Title IV aid programs.
5. Manages annual budget process; approves and monitors office expenditures; monitors fund balances; maximizes usage of grant funds to prevent over awards.
6. Oversees the processing of institutional and external scholarships, including the coordination of the respective committee and applicant eligibility review.
7. Performs need analysis using both institutional and federal methodologies for incoming and returning students, and awards institutional and federal grants, loans, and scholarships.
8. Assists the District staff in compiling data for various reports such as the annual funding application, fiscal operations report, basic grant report, California Guaranteed Student Loan reports and the Cal Grant B and C year-end reports; provides information during audits and official reviews as needed.
9. Supports and actively participates in the college's major initiatives for process improvement in financial aid and student services; formulates and implements procedures to assure efficient and effective operations, workflow and responsive service to applicants.
10. Supervises the evaluation and applications, support documents, and student need analysis criteria to properly package awards for financial aid.
11. Within District policy and procedures, establish standards and award policy and determine eligibility, authorizing the prepared packages in compliance with applicable federal and state program regulations and guidelines.
12. Collaborates with IT and third-party servicers to administer technology implementations and enhancements, including the financial aid module in the student information system (SIS), as well as federal and state systems, digital imaging technology, and other applications; oversees annual financial aid and scholarship system set-up.
13. Prepares and maintains department records and files.
14. Coordinates a variety of other departments within the college to assure timely processing of financial aid and to disseminate program information to students and staff concerning financial aid opportunities and procedural requirements.



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15. Maintains subject matter expertise in federal, state, and institutional financial aid regulations; attends and participates in program related conferences and workshops or other meetings concerned with the implementation of federal and state law, revising information as necessary to comply with changes.
16. Provides leadership and professional growth opportunities, makes employment recommendations, trains, supervises and evaluates the performance of financial aid staff, clerical support and student workers assigned to the area; applies disciplinary measures as appropriate.
17. Organizes, compiles, prepares and maintains annual and other periodic reports for distribution to District administration and federal and state agencies.
18. Monitors the fee-deferment segment of the financial aid program.
19. Develops and executes the College's loan default prevention program; develops handbooks and counseling sessions for loan applicants.
20. Represents the College to other educational institutions, external agencies, and community organizations.
21. Perform related duties as assigned.

### **QUALIFICATIONS**

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*The following generally describes the knowledge and ability required to enter the job and/or be learned within a short period of time in order to successfully perform the assigned duties.*

#### **Knowledge of:**

- Current federal, state, county and institutional laws, regulations, ordinances, and policies concerning financial aid programs and student financial aid office operations.
- Principles of office management, staff organization, supervision, and training.
- Current knowledge of sound, effective personnel practices.
- Principles and practices of record-keeping to produce accurate and precise financial aid records and reports, income tax and financial statements.
- Counseling and interviewing techniques; organization, collection and storage of data.
- Student financial aid packaging, Title IV regulations, Federal Register, Education Code and a Computer System.

#### **Ability to:**

- Effectively supervise a complex program of student financial assistance.
- Learn, understand, and apply laws, regulations, and procedures uniformly and consistently.
- Read, comprehend, and apply a wide range of written material having technical, legal and policy content.
- Communicate effectively both orally and in writing.
- Plan, train, direct and coordinate the work of others.
- Communicate effectively and maintain cooperative working relationships with students, faculty, support staff, external agencies, and the general public.
- Exercise sound judgment in reviewing and screening applications for grants and loans to determine eligibility.
- Meet schedules for presentation to District administration and outside agencies.



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- Organize and maintain records system.

### Education and Experience Guidelines

#### Education/Training:

- Bachelor's degree from an accredited institution of higher education with a major in business administration, public administration or related field.

#### Experience:

- Four (4) years of experience in the interpretation and implementation of state and federal guidelines pertaining to student eligibility of financial aid programs.

#### Equivalency Provision:

- In the absence of a Bachelor's degree from an accredited institution of higher education with a major in business administration, public administration or related field, an Associate's degree or completion of sixty (60) semester units from an accredited institution of higher education with a major in business administration, public administration or related field and six (6) years of experience in the interpretation and implementation of state and federal guidelines pertaining to student eligibility of financial aid programs is qualifying.

#### License or Certificate:

- Possession of an appropriate, valid California driver's license.

### PHYSICAL DEMANDS AND WORKING ENVIRONMENT

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*The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.*

**Environment:** Work is performed primarily in a standard office setting; occasionally travel from site to site.

**Physical:** Primary functions require sufficient physical ability and mobility to work in an office setting; to stand or sit for prolonged periods of time; to occasionally stoop, bend, kneel, crouch, reach, and twist; to lift, carry, push, and/or pull light to moderate amounts of weight up to 25 pounds; to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard; and to verbally communicate to exchange information.

**Vision:** See in the normal visual range with or without correction; vision sufficient to read computer screens and printed documents; and to operate assigned equipment.

**Hearing:** Hear in the normal audio range with or without correction.