

CHABOT-LAS POSITAS COMMUNITY COLLEGE DISTRICT

FINANCIAL AID OFFICER (CONFIDENTIAL/SUPERVISORY)

*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.*

SUMMARY DESCRIPTION

Under general direction, supervise and coordinate the operation of a comprehensive financial aid, scholarship, and veterans benefits program at an assigned campus; coordinate assigned activities with other divisions, outside agencies, and the general public; and provide highly responsible and complex staff assistance to the Dean of Enrollment Services.

REPRESENTATIVE DUTIES

The following duties are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional duties not listed, but within classification.

1. Coordinate the organization, staffing, and operational activities of a comprehensive financial aid, scholarship, and veterans benefits program at an assigned campus including administration of all federal and state grants, administration of the Board of Governors Grant and fee waivers, federal work-study, student loan management, scholarships, financial aid outreach, and veterans educational benefits; assume responsibility for fiscal management, compliance, and evaluation.
2. Participate in the development and implementation of goals, objectives, policies, and priorities; recommend and implement resulting policies and procedures.
3. Identify opportunities for improving service delivery methods and procedures; identify resource needs; review with appropriate management staff; implement improvements.
4. Direct, coordinate, and review the work plan for assigned services and activities; assign work activities and projects; monitor work flow; review and evaluate work products, methods, and procedures; meet with staff to identify and resolve problems.
5. Participate in the selection of assigned personnel; provide or coordinate staff training; ensure that staff is regularly trained in current regulations and appropriate and current uses of technological resources; work with employees to correct deficiencies; implement discipline and termination procedures.
6. Participate in the development and administration of assigned program budget; forecast funds needed for staffing, equipment, materials, and supplies; monitor and approve expenditures; recommend adjustments as necessary.
7. Reconcile federal and state financial aid program expenditures with appropriate agencies and within Banner software; correspond with students regarding overpayments; cancel payments and checks as necessary.
8. Review and make decisions regarding various types of student appeals; consult with students to resolve eligibility appeals, conflicting information and discrepancies, enrollment issues, dependency overrides, and payment of college fees and refunds; may refer students to appropriate student services for satisfactory academic progress.
9. Prepare applications for federal and state participation and funding of programs.
10. Direct, guide, and process student applications; determine eligibility for awards; notify successful granting of awards; direct the college's local scholarship and awards program; maintain correspondence with donors; remit payments and request disbursement.

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11. Organize and direct the maintenance of required financial aid records and statistics; ensure compliance with regulations; facilitate transfer of information on loans, grants, and student demographics to and from federal and state processors and agencies.
12. Assume leadership and responsibility to prepare and submit college and District reports as requested, and all accountability reports as required by state and federal agencies; maintain necessary related statistical and accounting records; oversee or perform research as required for the preparation of external reporting; compile and compute information and statistical reports.
13. Provide leadership for the development and maintenance of an automated financial aid system in conjunction with Management Information Services; incorporate planning for and implementation of advances in technology that may significantly impact financial aid processes and improve services to students and instructional integrity for audit purposes.
14. Coordinate and plan with the District Business Office and Information Technology Services to ensure proper disbursement of financial aid funds and reconciliation; coordinate with Information Technology Services and Support to ensure up-to-date data entry screens, data fields, tables, and other information is contained and accessible through the College's integrated student and business information systems; ensure proper testing of screens before upgrades.
15. Oversee the preparation for and provide leadership for internal, state, and federal audits as needed; respond to findings and initiate actions as required.
16. Design and implement a marketing and outreach effort to inform students and the community about financial aid opportunities and resources; develop and update communications used to convey and describe financial aid programs and services; collaborate in the overall college marketing, outreach, and recruitment planning and activities to create awareness of the mission of the community college.
17. Develop, organize, and conduct financial aid presentation for the college, campus, and outside community organizations; advise students, families, and the public on the procedural and technical aspects of financial aid program, policies, procedures, and requirements; interpret and explain federal and state financial aid regulations and legislation to administrators, faculty, staff, community, and students.
18. Oversee the Veterans Educational benefits program; ensure current training of support staff; provide appropriate service while maintaining compliance; coordinate and communicate regulatory and program issues regarding veterans with other departments.
19. Provide staff assistance to the Dean of Enrollment Services; participate on a variety of committees; prepare and present staff reports and other correspondence as appropriate and necessary.
20. Coordinate assigned activities with those of other college departments, educational institutions and organizations, community, and state and federal governing agencies; coordinate necessary aspects of financial aid regulations and services with other departments including Admissions and Records, Counseling, and Special Programs as they relate to student access and success.
21. Attend and participate in professional group meetings; maintain awareness of new trends and developments in the field of financial aid as well as applicable regulations, policies, and procedures; keep abreast of changing technologies and federal and state financial aid software programs; incorporate new developments as appropriate into programs.
22. Perform related duties as required.

MINIMUM QUALIFICATIONS

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.

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Knowledge of:

Operational characteristics, services, and activities of a Financial Aid program.
Principles of supervision, training, and performance evaluation.
Pertinent federal, state, and local laws, codes, and regulations including state and federal requirements for financial aid records, eligibility, and awarding regulations, policies, and guidelines.
Available benefits, services, programs, and supportive funding from public and private agencies.
Program reporting requirements.
Fundamental accounting, budgeting and fiscal reporting procedures.
Methods used in evaluating student eligibility.
Principles and techniques of interviewing and counseling.
Community college organization and purposes.
Principles of budget preparation and control.
Principles and procedures of record keeping.
Principles of business letter writing and report preparation.
Modern office procedures, methods, and equipment including computers.
Computer applications such as word processing, spreadsheets, and statistical databases including specialized software for financial aid processing.

Ability to:

Coordinate and direct college financial aid programs.
Supervise, direct, and coordinate the work of lower level staff.
Select, supervise, train, and evaluate staff.
Recommend and implement goals, objectives, policies, and procedures for providing financial aid programs.
Understand the organization and operation of the District and of outside agencies as necessary to assume assigned responsibilities.
Understand, interpret, and apply general and specific administrative and departmental policies and procedures as well as applicable federal, state, and local policies, laws, and regulations.
Participate in the preparation and administration of assigned budgets.
Plan and organize work to meet changing priorities and deadlines.
Effectively represent the Financial Aid Office to outside individuals and agencies to accomplish the goals and objectives of the unit.
Work cooperatively with other departments and outside agencies.
Respond tactfully, clearly, concisely, and appropriately to inquiries from the public, students, staff, or other agencies on sensitive issues in area of responsibility.
Interpret and explain financial aid policies and procedures.
Prepare clear and concise reports, complex correspondence, and program reporting.
Understand, interpret and apply legislation pertaining to financial grants and loans.
Maintain cooperative and helping relationships with the individuals for whom the program is intended and provide alternative suggestions or referrals for resolution of financial and other individual problems.
Exercise sound, consistent and professional judgment in reviewing and screening applicants.
Design and provide informative workshops to students and the community.
Make decisions and take independent action.
Implement changes to facilitate non-traditional program delivery processes.
Work with and exhibit sensitivity to and understanding of the varied racial, ethnic, cultural, sexual orientation, academic, socio-economic, and disabled populations of community college students.
Communicate clearly and concisely, both orally and in writing.
Establish and maintain effective working relationships with those contacted in the course of work.

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Minimum Education & Experience - Any combination of the following would provide a typical way to obtain the required knowledge and abilities.

Education/Training:

A Bachelor's degree from an accredited college or university with major course work in business administration, public administration, counseling, or a related field.

Experience:

Five years of responsible experience in a financial aid office including one year of administrative and/or lead supervisory experience.

PHYSICAL DEMANDS AND WORKING ENVIRONMENT

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.

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; to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard; and to verbally communicate to exchange information.

6/16/98

Adopted by Board of Trustees on June 21, 2016

Effective: June 22, 2016

Job Family: Supervisory