

# **CHABOT-LAS POSTAS COMMUNITY COLLEGE DISTRICT**

## **SENIOR FINANCIAL AID ADVISOR**

*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 of Financial Aid Director, apply knowledge of Federal, State and institutional financial aid regulations and policies to implement, maintain and improve financial aid programs, systems and processes within the college and district; responsible for operational services in the Financial Aid Office; monitor and participate in the work of the office, ensure work quality and adherence to established policies of office staff; perform a variety of complex duties involved in providing financial aid assistance and recommending available alternatives for students; process and verify student financial aid applications, and award student financial aid packages in accordance with prescribed policies, procedures, regulations and guidelines.

### **DISTINGUISHING CHARACTERISTICS**

This class is responsible for a variety of advanced and complex financial aid advisement, file review, problem resolution and implementation of changing regulations, etc. Positions at this level are distinguished from other classes within the series by performing duties that include complex and varied tasks and require a high degree of independent judgment to address vital Federal and State compliance issues, with a significantly higher level of responsibility. Incumbents in this class must have a broad, thorough and comprehensive knowledge of financial aid programs and applicable laws, policies and regulations, are required to be fully trained in all procedures related to assigned area of responsibility, and must be able to perform the duties assigned to lower levels classifications in the series. Employees at this level are expected to lead the office under general direction and minimal supervision, make decisions on a higher-level line of authority, utilizing independent judgment and initiative, and will provide leadership and training to staff.

### **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 or different duties from those set forth below to address business needs and changing business practices.*

1. Serve as lead advisor in the Financial Aid Office; oversee non-technical office operations and activities, and provide support to Administrator in resolving operational and program issues.
2. Participate in the development of department goals and objectives; identify strengths and areas needing improvement within the Financial Aid Office, and between the Financial Aid Office and other departments on campus; conduct assessment of student needs, including monitoring and evaluating the efficiency and effectiveness of service delivery methods and procedures. Make recommendations for changes and improvements to existing standards, policies, and procedures; participate in the implementation of approved policies and procedures, and training of staff; maintain updated office policies & procedures manual.
3. Work with Director to coordinate and provide staff training; provide leadership and work with employees to ensure compliance with established policies and procedures.
4. Identify process or procedural problems and initiate an appropriate response, using Federal, State and institutional resources to troubleshoot and resolve problems.

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5. Review and evaluate files as internal audit for compliance and training; oversee and provide leadership for preparation for internal, Federal, and State audits as needed; assist Director to respond to findings, and take any required corrective action.
6. Responsible for maintaining awareness of new trends and developments in the field of Financial Aid, as well as applicable regulations, policies, and procedures; master an extensive working knowledge of available online resources [e.g. listserves, webinars, email blasts, Information for Financial Aid Professionals (IFAP), California Student Aid Commission (CSAC), California Community Colleges Chancellor's Office (CCCCO), online handbooks and IRS tax information guides], trainings from national, state and local financial aid organizations to ensure extensive working knowledge of all current and pending Federal, State and external financial aid policies and regulations.
7. Interpret District, Federal, and State regulations and policies to provide information and services to students and staff. Interpret, apply and help implement constantly changing rules to office policies and procedures in compliance with all mandated regulations for financial aid awards; review and update forms, handouts, and consumer information materials regularly for accuracy.
8. Respond to difficult inquiries and requests from students regarding financial aid options and programs; first point of contact for resolution of student concerns, balancing student needs with compliance and adherence to Federal, State, District and College guidelines; review, assess and bring to conclusion more complex student files or situations; analyze situations accurately and adopt an effective course of action; assist Director with file and fraud investigations, provide summary and detail for determination of eligibility.
9. Review student aid applications, conduct needs analysis, advise students, and evaluate financial need and eligibility based on program criteria; award financial aid packages; evaluate student academic progress and advise students of subsequent options. Review and make decisions regarding various types of student appeals; communicate with students to resolve eligibility appeals, conflicting information and discrepancies, enrollment issues, dependency overrides, etc.
10. Collaborate with various Student Services programs [Extended Opportunity Programs and Services (EOP&S), Admissions & Records, Veterans Services, Disabled Student Services and Programs (DSPS), Foster Youth Initiative, TRiO, Student Equity, etc.] and academic departments, to determine student eligibility for financial assistance, developing and disseminating accurate information to students and staff.
11. Identify, create and update online and ad hoc reports as needed; collect, analyze and draw conclusions from statistical data related to financial aid; prepare related reports on operations and activities as assigned. Resolve discrepancies and maintain records.
12. Responsible for completing large volumes of detailed work and responsibilities in relation to student financial aid with a high level of accuracy in a fast paced environment with constant interruption while adhering to multiple strict deadlines.
13. 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.*

**Knowledge of:**

1. Federal, State, local and District laws, rules, regulations, policies, procedures, and processes related to student financial aid programs.
2. Operations, services, and activities of a Financial Aid Office.
3. Advanced methods and techniques of advising students regarding financial aid options and programs.
4. Office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, specialized software for financial aid processing, and databases.
5. State and Department of Education software, and financial aid systems and databases.
6. Effective oral and written communication skills; English usage, spelling, grammar and punctuation. Principles of business letter writing and basic report preparation. Principles and procedures of record keeping.

**Ability to:**

1. 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.
2. Remain current with present and pending financial aid regulations, policies, and procedures as well as Federal and State legislation.
3. Determine eligibility of students for financial assistance through analysis and interpretation of data and guidelines; exercise sound, consistent and professional judgment in reviewing and screening applicants.
4. Review, assess and bring to conclusion more complex student files or situations.
5. Analyze situations accurately and adopt an effective course of action.
6. Recommend and implement goals, objectives, policies and procedures for providing financial aid services.
7. Exercise good judgment and maintain confidentiality regarding critical and sensitive information, records, and reports.
8. Plan, organize and prioritize work in order to meet changing schedules and timelines.
9. Operate office equipment including computers and supporting word processing, spreadsheet, and database applications.
10. Enter, modify, and retrieve data using a computer at a speed necessary for successful job performance.
11. Independently prepare routine correspondence and memoranda; prepare variety of clear, concise comprehensive and statistical reports. Communicate clearly and concisely, both orally and in writing.
12. 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.

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13. 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.
14. Learn and use advances in technology required to remain current in the field of financial aid.
15. Establish and maintain effective working relationships with those contacted in the course of work; work cooperatively with other departments in college, District, and outside agencies.

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

**Education/Training:**

Equivalent to completion of the twelfth grade supplemented by college level course work in business administration, accounting, or a related field.

**Experience:**

Four years of progressively responsible financial aid experience performing duties comparable to a Financial Aid Advisor II with the Chabot-Las Positas Community College District. Experience with Banner or other enterprise information management system.

**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 with frequent student and public contact.

**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.

Adopted by Board of Trustees on: December 4, 2018

Effective: December 5, 2018

Job Family: Technical-Paraprofessional