

**San Jose/Evergreen Community College District
Classified Management Job Description**

Position: Associate Director, Financial Aid

Department: Student Affairs

College: SJCC or EVC

Date: July 1, 2018

POSITION PURPOSE

Under the general direction of assigned administrator, the Associate Director of Financial Aid, oversees, organizes, administers, manages, and evaluates a comprehensive financial aid office and delivery system for students and designated student outreach programs for the assigned college.

NATURE and SCOPE

The Associate Director of Financial Aid is responsible for evaluating financial aid eligibility; award disbursement; defining and articulating program goals, philosophies, and standards; requiring approvals for federal and state funds; and making office budgeting decisions to maintain office equipment, supplies, and technical support. Ensures that the college's policies are in agreement with federal regulations; maintains a high level of quality and integrity so as not to create institutional liability; and supervises staff.

KEY DUTIES and RESPONSIBILITIES

1. Oversees the daily operations of department including organizing and staffing for effective customer service for financial aid, grant and work study programs.
2. Plans, organizes, and implements work projects. Facilitates communications about departmental activities, events, deadlines, and timelines.
3. Supervise and evaluate the performance of assigned staff; interview and participate in selecting employees; train, counsel, discipline and terminate personnel according to established policies and procedures.
4. Organizes, supervises, performs, and reviews work activities to ensure compliance with quality standards and deadlines to ensure compliance with federal and state regulations and to minimize financial liability. Identifies opportunities for continuously improving service.
5. Administers a full range of financial aid programs including but not limited to loans, grants, and student aid and work study programs.
6. Serves as primary contact for federal and state reporting purposes. Analyzes and interprets federal and state regulations governing financial aid.
7. Directs, guides, and processes student applications, determining eligibility for awards, and notification of successful granting of awards.
8. Develops and implements comprehensive policies and procedures manual in accordance with federal regulations and departmental and college policy.
9. Consults with and advises administrators, faculty, staff, and students regarding financial aid programs, policies, procedures and problems. Chairs committees dealing with student financial aid.

10. Conducts financial aid presentations for the college, campus and outside community organizations. Advises students, families, and the public on the procedural and technical aspects of financial aid programs, policies and procedures, and requirements.
11. Reviews and makes decisions regarding student appeals for satisfactory academic progress denied by the financial aid professional support staff.
12. Manages federal and state grant programs including maintaining awareness of changes in federal/state regulations which govern these programs. Implementing new procedures as needed.
13. Develops and updates communications used to convey and describe financial aid programs and services in accordance with federal consumer information laws, including publications and forms.
14. Performs data management functions that include establishing and testing tables and fields for storing information and making computations for administration of financial aid programs
15. Prepares and recommends budgets for the department and various programs. Organizes budget and financial material during the budget process. Monitors expenditures and ensures accurate fiscal records during implementation of the program.
16. Assigns and/or performs the processing of payroll, accounts payable, and other accounting documents. Assures the office has adequate supplies to conduct business.
17. Coordinates monthly reconciliation of financial aid programs. Verifies disbursements to students on loans and grants, accessing computerized databases for information. Prepares reports for internal use and for compliance with external agency requirements.
18. Facilitates transfer of information on loans, grants, and student demographics to and from federal and state processors and agencies.
19. Establishes routines and protocols for automated data transfer between the College and agencies.
20. Coordinates 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.
21. Assigns and/or performs research as assigned or required for external reporting. Computes and compiles information and statistical reports.
22. Maintains up-to-date knowledge of laws, regulations, policies, procedures and automated business systems that guide or support the functional area. Develops operational policies and procedures that enhance the operations of the work section.
23. Maintains up-to-date knowledge of trends in financial aid, regulations, policies, and procedures.
24. Performs other duties and responsibilities as assigned.

EMPLOYMENT STANDARDS

Knowledge of:

1. Federal, state, local, and private financial aid programs and requirements, including the work flow requirements that support program compliance.
2. Financial aid programs, procedures, eligibility requirements, and calculations.
3. Automated information processing systems (both software and databases) that support financial aid.
4. Financial aid laws, policies and procedures.
5. Supervision of staff, office organization and workflow design, reporting requirements, and confidential record keeping.

Skills and Abilities to:

1. Prepare highly complex correspondence and reports.
2. Compute sums, quotients, fractions, percentages, ratios, and statistics.
3. Deliver presentations, and convey technical information to a wide variety of customers
4. Work independently.
5. Interpret, explain, and apply College and financial aid program policies, rules, and objectives.
6. Encourages high morale and efficiency.
7. Plan, organize and prioritize work in order to meet schedules and timelines.
8. Requires the ability to analyze situations and accurately and adopt an effective course of action.
9. Communicate with a diverse population of students, staff, and the public using tact and courtesy in sometimes confrontational or strained situations.
10. Maintain confidentiality of information.

Education and Experience:

1. Demonstrated sensitivity, knowledge, and understanding of the diverse academic, socioeconomic, gender, cultural, disability, and ethnic backgrounds of the students we serve and sensitivity to and knowledge and understanding of groups historically underrepresented, and groups who may have experienced discrimination.
2. Bachelor's degree in student services administration, public administration, educational administration, business management or a related field, or equivalent combination of education and experience, for which similar knowledge and abilities could be acquired.
3. Four years of progressively responsible financial aid experience including two years of Management experience.

Working Conditions:

1. Typical office environment.

Date Approved: 6/10/08, 5/13/14, 5/8/18

Salary Range: M-26 (reclassified from M-18 effective 7/1/14, from M23 effective 7/1/18)

EEO-Category: 2B1 – Executive/Administrative/Managerial