

San Jose/Evergreen Community College District
Classified Management Job Description

Position: Director, Financial Aid & Scholarship Programs

Department: Student Services

POSITION PURPOSE

Under general direction, the Director of Financial Aid and Scholarship plans, organizes, directs and integrates operations and activities of a comprehensive financial aid & Scholarship office and delivery system for students; manages, evaluates, approves financial aid eligibility and awards; disbursement processes; ensures compliance with applicable laws and regulations; develops strategic plans to maximize the value of financial aid programs for eligible students and to deliver equitable financial aid outcomes for students from diverse communities; supervises and coordinates the preparation of all required and ad hoc reports related to the operation of the office through accurate reporting and auditing processes; administers and maintains fiscal controls and budgets for the program; collaborates with leadership and other department directors to implement financial aid policies, procedures and initiatives in support of the goals and objectives of the college and the District; and performs other duties as assigned.

ESSENTIAL DUTIES AND RESPONSIBILITIES

The duties listed below exemplify the work of the classification and assigned duties may include work that is similar, related or a logical assignment to this class.

1. Plans, directs, controls, integrates and evaluates the activities of the College's financial aid and scholarship department in providing a full range of financial aid services including grants, loans, and work study programs; manages and supervises all financial aid processes for eligibility verification, application review/approval and the packaging of student loans, grants, and scholarship awards; interprets, applies and conforms to federal, state and local laws/regulations in the delivery of student financial assistance.
2. Directs, integrates and evaluates the student financial aid application process; determines eligibility status for awards and notifies applicants of grant awards and any related financial aid determinations; reviews and adjudicates student appeals; coordinates the administration of internal and external scholarship programs with various foundations, District/College business services departments, and other college programs.
3. Directs, plans and assigns work activities to ensure compliance with quality standards and deadlines of federal and state regulations and to minimize the College's financial liability; implements and monitors secure, accurate and timely transfer of information on loans, grants, scholarships, and student demographics to and from federal and state processors and other funding agencies; develops and identifies opportunities for continuous improvement of services.
4. Directs and monitors monthly reconciliation of financial aid funds; verifies disbursements to students of loans and grants by accessing and analyzing automated system and database information; prepares reports for internal use and for compliance with external agency requirements; performs data management functions to include establishing and analyzing tables and fields for storing information and making computations for administering financial aid programs; establishes routines and protocols for automated data transfer between the College and external agencies.
5. Participates in developing and administering the department budget; monitors performance against the annual budget; forecasts funds needed for the department's staffing, equipment, materials and supplies and approves department expenditures.

6. Directs and oversees the development, implementation and evaluation of plans, processes, systems and procedures related to financial aid and scholarship accounting activities; develops and implements a departmental policies and procedures manual addressing operations and processes.
7. Manages the work assignments and evaluates the performance of assigned staff, student workers and volunteers; interviews and participates in selecting employees; trains, counsels, and disciplines personnel according to established policies and procedures.
8. Maintains confidential financial aid data and ensures timely and accurate submission of required federal, state, and local reports and requests; manages the production of reports and materials for presentations, reviews, audits and required submissions to auditors and agencies with legal oversight over the College's financial aid programs
9. Consults with and advises administrators, faculty, staff, and students regarding financial aid programs, policies, procedures and issues; provides information and training to staff, students and volunteers on financial aid work processes and regulatory requirements; advises students, families, and the public on the requirements of financial aid programs.
10. Collaborates with Information Technology Services and Support (ITSS) and campus technology teams to ensure up-to-date data entry screens, data fields, tables and other information is available through the College's student and business information systems; coordinates with various departments to identify and takes action on fraudulent student accounts and information.
11. Makes presentations to the Board of Trustees and other board-level groups; develops and updates communications, publications and forms to convey and describe financial aid and scholarship programs/services in accordance with federal consumer information laws; answers questions and provides information during audits and official reviews.
12. Leads and serves on related student financial aid and scholarship committees and represents the College and District at local, regional, state and national conferences, meetings, workshops and training seminars; serves as primary contact for federal and state reporting purposes.
13. Manages federal and state grant programs; maintains awareness of changes in federal/state regulations that govern these programs; implements new procedures as needed.
14. Performs other related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

1. Advanced knowledge of financial aid and scholarship programs, procedures, eligibility requirements, and calculations.
2. Technology systems (both software and databases) supporting financial aid and scholarships.
3. Administrative principles and methods including goal setting, strategic planning, program development/implementation, delegation and employee supervision.
4. Effective financial aid program operations within a diverse educational and professional environment.
5. Principles and practices of generally accepted accounting and auditing procedures.
6. Principles and practices of public administration, including budgeting, purchasing and maintaining public records.
7. Principles and practices of organizational improvement, equity and culture change.

8. Federal, state and other applicable laws and regulations and District policies and procedures governing financial aid and scholarship programs including applicable sections of the California Education Code, Title 5, Family Educational Rights and Privacy Act (FERPA).
9. Theories and techniques of negotiation, mediation and conflict resolution.
10. Principles and practices of effective management and supervision.
11. Board Policies, Administrative Regulations, Accrediting Commission for Community & Junior Colleges Standards, Human Resources procedures and collective bargaining agreements.

Skills and Abilities to:

1. Plan, organize, direct and evaluate the programs and activities of a community college's financial aid and scholarship program.
2. Interpret, explain, and apply college financial aid program objectives, policies, and rules.
3. Formulate a clear vision, strategic plan, and appropriate operational goals, objectives and outcomes for programs and services of the College and for the Financial Aid and Scholarships office.
4. Maintain accurate records and produce detailed, thorough, and accurate statistical analyses and reports.
5. Deliver presentations and convey technical information to a wide variety of stakeholders.
6. Conduct internal and external environment analyses to inform strategic planning processes.
7. Conduct research, interpret data and present reports, proposals and recommendations clearly, logically and persuasively to diverse audiences.
8. Present solutions to management with confidence and effectiveness.
9. Direct, schedule, coordinate and evaluate the work of assigned employees.
10. Build and foster knowledgeable, cohesive and effective work teams.
11. Establish and maintain cooperative and effective working relationships with others.
12. Operate a computer, assigned office equipment and standard business applications.

Education and Experience:

1. Bachelor's degree from an accredited institution in business administration, public administration, education or a closely related field.
2. Five years of progressively responsible experience providing financial aid and scholarship services including two at a supervisory or manager level.
3. Demonstrated sensitivity, knowledge, and understanding of the diverse academic, socioeconomic, gender identity, sexual orientation, 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.

Desirable Qualifications:

Prior experience providing service to students at higher education institution is preferred.

WORKING ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential duties of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Employees work under typical office conditions, subject to frequent interruption and to intermittent exposure to individuals acting in a disagreeable fashion. The employee may be required to travel to locations other than the assigned work site, and occasional evenings, holiday and/or weekend work may be required.

Physical Demands:

While performing the duties of this class, employees are primarily in a stationary position and are required to move about the office to access office machinery, files, etc.; perform constant operation of a computer and other communication and office equipment; observe details at close range; and move or lift up to 10 pounds.

Mental Demands:

While performing the duties of this class, employees are regularly required to accurately communicate information and other ideas so that others will understand using written and oral communication skills; read and interpret data, information and documents; analyze and solve problems; observe and interpret situations; learn and apply new information or skills; perform highly detailed work; work on multiple, concurrent tasks; work with frequent interruptions; work independently and under intensive deadlines; and interact with District managers, staff, the public and others encountered in the course of work.

Board Approved: 12/9/2025

Salary Range: M-26

EEO Category: 2B1- Executive/Administrative/Managerial