

**DIRECTOR, FINANCIAL AID & SCHOLARSHIPS**

| **Reports to:** | Dean, Admissions & Student Support |  |  |
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| **Dept:** | Admissions & Student Support | **Range:** | CM-14 |
| **FLSA:** | Exempt | **EEO:** | Executive/Administrative/Managerial |

*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 by individual positions.*

### BASIC FUNCTION:

Under general direction, plan, organize, integrate and direct the work of the Financial Aid & Schola­rships department; provide expert professional assistance and guidance to district manage­ment on finan­cial aid and scholarships; and perform related duties as assigned.

### ESSENTIAL DUTIES & RESPONSIBILITIES:

*The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class.*

1. Plan, organize, direct, control, integrate and evaluate the work of the Financial Aid & Scholar­ships department; with managers and supervisors, develop, implement, coordinate and evaluate policies and procedures for the administration of various financial aid programs; revise as necessary to comply with changes in state and federal laws develop, implement and monitor work plans to achieve goals and objectives; contribute to the development of and monitor performance against the annual department budget; manage and direct development, implementation and evaluation of plans, work processes, systems and procedures to achieve annual goals, objectives and work standards.
2. Direct and manage the performance of Financial Aid & Scholarships staff; direct and over­see the selection of managers and technical and professional staff; establish perform­ance requirements and personal development targets for direct reports; regularly monitor perform­ance and provide coaching for performance improvement and development, in accordance with district human resources policies and labor contract agree­ments.
3. Provide day-to-day leadership and work with staff to ensure a high-performance, service-oriented work environment that supports achieving the department’s and district’s mission, objectives and values.
4. Through subordinate managers and supervisors, define program goals and philosophies; develop procedures and best practices necessary to determine financial aid needs and to properly package applications for financial aid; analyze applications and verify eligibility in compliance with applicable state and federal regulations and guidelines; maintain program quality and integrity;
5. Prepare formal applications for government and private funds based on applicable demo­graphic, financial and personal considerations; prepare and verify expenditure reports required by state and federal agencies.
6. Monitor status of program funds; prepare budgets and disbursement program guidelines; account for proper financial aid funds expenditures; prepare a variety of complex statistical and narrative reports; ensure the maintenance of accurate financial aid records and files; develop, evaluate and implement internal controls to avoid district liability; direct the prepa­ration of documentation for external and internal audits; consult with auditors as needed; conduct regular department program reviews.
7. Plan, organize and oversee the district’s scholarship program to ensure the awarding of scholarships is consistent with applicable requirements; authorize transfer of funds.
8. Manage a complex, integrated college financial aid and scholarships records system, including records documenting eligibility, financial need, sources of funds, scholarship applications and awards, and the proper retention and destruction of student records as required by federal and state regulations.

### OTHER DUTIES:

1. Review correspondence from students with special circumstances and resolve as appro­priate; interview and advise students regarding financial aid eligibility; review and resolve student appeals; determine proper course of action if final appeal is approved by the Finan­cial Aid Appeals Committee.
2. Maintain knowledge and assist in training staff in the use of the financial aid computer infor­ma­tion system used in student needs analysis and awards and records maintenance; direct the research and resolution of related computer application problems; provide input into college-wide computer decisions and the smooth operation of integrated student data­bases; serve as a resource on related computer projects; review and approve computer and tech­nological changes relating to student financial aid records.
3. Plan, develop, organize and direct campus financial aid orientation sessions; direct the district’s outreach activities regarding financial aid and scholarships; provide application and filing deadline information to feeder high schools and satellite centers as appropriate; create and disseminate public and student financial aid information, notices and publications.
4. Perform related duties as assigned.

### KNOWLEDGE AND ABILITIES:

### KNOWLEDGE OF:

1. Applicable federal, state and local laws, rules and regulations regarding student financial aid and award programs.
2. Principles and practices of supervision and training.
3. Research methods and analysis techniques.
4. Basic principles and practices of organization and culture change.
5. Principles and practices of sound business communication.
6. Oral and written communication skills including correct English usage, grammar, spelling, punctuation and vocabulary.
7. Fundamental accounting and fiscal reporting procedures.
8. Business math.
9. Personal and financial problems of students.
10. Modern office practices, procedures and equipment.
11. Data processing applications, financial aid needs analysis, accounting and recordkeeping.
12. On-campus and external scholarship programs.
13. District organization, operations, policies and objectives.
14. Interpersonal skills using tact, patience and courtesy.
15. District human resources policies and labor contract provisions.
16. Safety policies and safe work practices applicable to the work.

### ABILITY TO:

1. Plan, organize, manage, assign, delegate, review and evaluate the work of staff engaged in financial aid and scholarship work processes.
2. Define issues, analyze problems, evaluate alternatives and develop sound, independent conclusions and recommendations in accordance with laws, regulations, rules and policies.
3. Analyze and make sound recommendations on complex financial aid and scholarship issues.
4. Work collaboratively with other directors and managers and provide expert advice and counsel to develop solutions to complex issues.
5. Organize, set priorities and exercise expert, independent judgment within areas of responsi­bility.
6. Develop and implement appropriate procedures and controls.
7. Prepare clear, concise and comprehensive correspondence, reports, studies and other written materials.
8. Communicate effectively, both orally and in writing.
9. Understand, interpret, explain and apply applicable laws, codes and ordinances.
10. Represent the district effectively in dealings with external stakeholders.
11. Present proposals and recommendations clearly, logically and persuasively.
12. Operate a computer and standard business software.
13. Use tact and diplomacy in dealing with sensitive and complex issues, situations and concerned people.
14. Demonstrate sensitivity to and understanding of diverse academic, socioeconomic, cultural, ethnic and disability issues.
15. Establish and maintain effective working relationships with all those encountered in the course of work.

### EDUCATION AND EXPERIENCE:

### Graduation from an accredited four-year college or university, and five years of related experi­ence, including three years of progressively responsible experience in a college financial aid program; or an equivalent combination of training and experience.

### LICENSES AND OTHER REQUIREMENTS:

A valid California driver’s license and the ability to maintain insurability under the district’s vehicle insurance program.

**WORK DIRECTION, LEAD AND SUPERVISORY RESPONSIBILITIES:**

Financial Aid & Scholarships staff, temporary/student workers and contractors/consultants.

**CONTACTS:**

Governing board members, district administrators, faculty, staff, students, other college and community organizations, vendors, contractors, foundation/community supporters, media and the general public.

**PHYSICAL EFFORT:**

*The physical efforts described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Primarily sedentary with intermittent standing, walking, bending and stooping; occasional light lifting and carrying of objects weighing up to 25 pounds; ability to travel to various locations on and off campus as needed to conduct district business.

**EMOTIONAL EFFORT:**

Ability to develop and maintain effective working relationships involving interactions and com­munications personally, by phone and in writing with a variety of individuals and/or groups from diverse backgrounds on a regular, ongoing basis; ability to work effectively under pressure on a variety of tasks concurrently while meeting established deadlines and changing priorities.

**WORKING CONDITIONS:**

Primarily business office environment; subject to frequent public contact and interruption; inter­mittent exposure to individuals acting in a disagreeable fashion; may work at any district location or authorized facility with occasional evenings and/or weekends on an as-needed basis. Occa­sional local travel may be requested.