

SOUTHWESTERN COMMUNITY COLLEGE DISTRICT

CLASS TITLE: SENIOR FINANCIAL AID SPECIALIST

SUMMARY DESCRIPTION

Under the direction of the Director of Financial Aid, lead, oversee, and participate in the more complex and difficult work of staff responsible for providing specialized assistance and information to applicants regarding Financial Aid programs; prepare needs analysis and packaging of financial aid applications; coordinate the activities of the programs and make award decisions; coordinate financial aid automation to assure timely and accurate reporting and information retrieval.

DISTINGUISHING CHARACTERISTICS

This is the advanced journey level class in the Financial Aid Specialist series. Positions at this level are distinguished from the Financial Aid Specialist by the level of responsibility assumed and the complexity of duties assigned. Employees perform the most difficult and responsible types of duties assigned to classes within this series including the provision of lead supervision and work direction over lower level financial aid staff, coordinating the activities of financial aid programs and making award decisions, and coordinating the implementation of new financial aid software or system functions. Employees at this level are required to be fully trained in all procedures related to assigned area of responsibility.

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. Lead, plan, train, and review the work of staff responsible for providing specialized assistance and information to applicants regarding Financial Aid programs; participate in performing the most complex work of the unit including coordination of program activities. ***E***
2. Verify the work of assigned employees for accuracy, proper work methods, techniques, and compliance with applicable standards and specifications. ***E***
3. Prepare needs analysis and package of financial aid applicants; interpret government and campus policies to determine appropriate award allocation for each applicant; establish student budgets and determine program eligibility; modify awards, budgets and needs analysis for students either individually or using automated batch processes; ensure compliance with state and federal guidelines. ***E***
4. Advise and counsel student applicants and recipients in all phases of financial aid; interview students and assess individual academic, financial and personal situations; determine impact of needs analysis; explain program regulations, requirements and institutional policies; assure accuracy and completeness of applications. ***E***
5. Create and maintain all automated communications to students including award letters, document request letters, loan letters and probation/disqualification letters. ***E***
6. Monitor and maintain the automated process to calculate satisfactory academic progress; review student educational plans; develop quality control reports and audit files to determine students' continued eligibility for financial aid. ***E***

SOUTHWESTERN COMMUNITY COLLEGE DISTRICT
Senior Financial Aid Specialist - *Continued*

7. Coordinate activities of assigned state and federal financial aid programs; monitor annual funding to assure adequate funds are available for projected student awards; coordinate with fiscal services staff to correctly disburse aid to eligible students. ***E***
8. Coordinate the implementation of new financial aid software; evaluate, test, implement and upgrade automated office delivery systems; coordinate automated systems to maintain quality and standards; conduct staff training sessions and provide on-going technical software support to office personnel; document new Financial Aid office procedures as a result of on-going software integration. ***E***
9. Oversee software and databases to automatically exchange information between various federal agencies and the College; facilitate sending and receiving of student applicant data, disbursement data and federal reports. ***E***
10. Monitor and troubleshoot computer related problems; identify unresolved issues to software vendors or campus information systems staff. ***E***
11. Compile student data and prepare various reports for internal/external departmental needs including state and federal agencies to fulfill compliance regulations and obtain or maintain program funding; review accuracy of data submitted; prepare annual FISAP and MIS reports. ***E***
12. Serve as primary liaison with fiscal services staff to reconcile reports, resolve discrepancies between awards and disbursements and determine financial aid overpayments; coordinate the annual planning of scheduled disbursement dates. ***E***
13. Maintain current knowledge of complex regulations and requirements for assigned financial aid and student loan programs and current software trends; attend meetings, vendor seminars and participate in on- and off-campus workshops. ***E***
14. Plan, organize and conduct orientations and workshops; coordinate activities with other related on-campus student services; refer students to social service agencies and other community resources as appropriate. ***E***
15. Maintain external contacts with government agencies and other community colleges for the purpose of coordinating, obtaining and verifying information. ***E***
16. Provide technical expertise to other personnel in the Financial Aid Office; assist in training new staff as requested.
17. Perform related duties and responsibilities as required.

KNOWLEDGE AND ABILITIES

Knowledge of:

- Federal and State Student Financial Assistance programs including policies, rules and regulations.
- Principles of lead supervision and training.
- Financial and income tax statements.
- Interviewing and advising techniques.
- Various financial aid software systems.
- Recruitment techniques and methods.
- Public speaking methods.
- District organization, operations, policies and objectives.

SOUTHWESTERN COMMUNITY COLLEGE DISTRICT
Senior Financial Aid Specialist - *Continued*

Technical aspects of field of specialty.
Methods and terminology of financial record keeping.
Principles and practices of record keeping.
Methods and techniques of comprehensive and technical report preparation.
Office procedures, methods and equipment including computers and applicable software applications such as word processing, spreadsheets and databases.
Oral and written communications skills.
Interpersonal skills using tact, patience and courtesy.

Ability to:

Lead, organize, and review the work of staff.
Independently perform the most difficult financial aid processing and award determination functions.
Interpret, explain, and enforce financial aid policies, rules, regulations and procedures.
Advise, counsel and interview students from diverse ethnic and socio-economic backgrounds.
Implement, coordinate, evaluate and maintain a variety of financial aid software programs.
Train financial aid staff in various phases of financial aid processing and operation of new financial aid software systems.
Operate office equipment including computers and supporting word processing, spreadsheet and database applications.
Maintain accurate and complete records and prepare comprehensive and technical reports.
Understand and follow oral and written directions.
Work effectively with frequent interruptions.
Analyze situations accurately and adopt an effective course of action.
Meet schedules and time lines.
Work independently with little direction.
Work with and exhibit sensitivity to and understanding of the diverse racial, ethnic, disabled, sexual orientation, and cultural 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.

EDUCATION AND EXPERIENCE

Any combination equivalent to: Bachelor's degree with major course work in education, counseling or related field and two years of increasingly responsible experience in students services or related program including demonstrated experience with PC-based and mainframe financial aid software systems.

LICENSE OR CERTIFICATE

Valid California driver's license and a safe driving record.

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 interruptions and distractions; extended periods of time viewing computer monitor; possible exposure to dissatisfied individuals.

SOUTHWESTERN COMMUNITY COLLEGE DISTRICT
Senior Financial Aid Specialist - *Continued*

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.

Vision: See in the normal visual range with or without correction.

Hearing: Hear in the normal audio range with or without correction.

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