

FINANCIAL AID SPECIALIST

DEFINITION

Under general supervision, performs specialized duties related to the operation of the College's financial aid programs; interviews, advises, and assists students with program services; processes and awards student financial aid according to federal and state regulations and College policies and procedures; provides information to students and College staff regarding financial aid programs and services; provides assistance for a wide variety of assignments related to the development and implementation of assigned programs, projects, and services.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the assigned managerial personnel. May provide technical and functional direction to temporary employees and assigned staff.

CLASS CHARACTERISTICS

This classification is responsible for coordination of assigned specialized program implementation and outreach tasks in support of Financial Aid programs. The work has technical aspects requiring the interpretation and application of policies, procedures, and regulations and involves frequent contact with students, faculty, and outside organizations. Positions at this level perform the full range of duties as assigned, working independently, and exercising judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

EXAMPLES OF ESSENTIAL FUNCTIONS (Illustrative Only)

1. Performs the full range of routine to complex specialized duties involved in processing and evaluating application materials and funding of financial aid opportunities to eligible students.
2. Verifies initial and continuing eligibility of students who have applied for or been granted financial aid and informs affected students of their status; resolves issues related to overpayments, concurrent enrollment; calculates Return of Title IV Aid, including adjustments as defined per regulatory changes and federal updates and other financial aid issues for example Satisfactory Academic Progress (SAP) and Pell usage in a timely manner.
3. Assists with monthly, quarterly, and year-end reconciliation of financial aid program accounts.
4. Verifies financial aid files to ensure accuracy of information provided by parents and students on financial aid applications in conjunction with IRS forms, social security records, and various agencies used to determine financial aid eligibility according to federal guidelines and forms.
5. Analyzes and reviews applications and required documentation to determine financial need and program eligibility for a variety of federal, state, and College programs.

6. Packages financial aid awards using standard needs analysis as defined in Title IV guidelines and in accordance with specific federal, state, and local guidelines; conducts loan entrance and exit interview sessions with students.
7. Authorizes and posts loan amounts to student accounts; makes adjustments as needed; reconciles and refunds disbursements.
8. Ensures accurate and timely reporting of student and aid information to lenders, servicers, and guaranty agencies.
9. Assists with planning and organizing outreach activities targeting students eligible for special assistance and/or services.
10. Assists with outreach financial aid programs, services, and events through various communication venues and social media; develops flyers, brochures, programs, and other outreach materials.
11. Conducts workshops and presentations on various topics related to financial aid programs; creates, develops, and revises workshop materials, handouts, and packets.
12. Prepares and maintains various programmatic and/or student files and records.
13. Gathers, assembles, updates, and distributes a variety of department specific information, forms, records, and data as requested; prepares and maintains a variety of databases and reports.
14. Provides information, advice, and counsel to students, parents, and College staff that requires the use of judgment and the interpretation of rules, regulations, policies, and procedures; meets with students, parents, and College staff to obtain data, interpret information, and answer questions; prepares correspondence independently to answer questions, request information, or provide explanations.
15. Maintains accurate and detailed spreadsheets, files, and records, verifies accuracy of information, researches discrepancies, and records information.
16. Researches, compiles, and organizes information and data on topics related to Financial Aid programs; prepares and assembles reports, manuals, articles, announcements, and other informational materials.
17. Attends and participates in program-related College committees, community activities, and professional conferences and meetings concerned with the development and implementation of financial aid programs and/or services.
18. Assists with the analysis and reconciliation of student financial aid programs, e.g. disbursements in compliance with federal, state, and College regulations.
19. Promotes an environment of belonging as it relates to diversity, equity, inclusion, social justice, anti-racism, and accessibility.
20. Provides quality customer service when interacting with the public, vendors, students, and College staff, including individuals from minoritized groups.
21. Supports and abides by federal, state, and local policies and Board Policies and Administrative Procedures.
22. Participates on committees, task forces, and special assignments, including, but not limited to, Screening and Selection Committees and mandated trainings as required.
23. Prepares and delivers oral presentations related to assigned areas as required.
24. Performs other related or preceding classification duties as assigned.

QUALIFICATIONS

Knowledge of:

1. Principles and practices of supporting a diverse, equitable, inclusive, socially just, antiracist, and accessible academic and work environment.
2. Updated regulations and practices in federal, state, and institutional financial aid programs, including an understanding of the FAFSA Simplification Act and changes in Title IV reporting requirements.
3. Principles, practices, and service delivery needs related to the development and implementation of financial aid programs.
4. Procedures for planning, implementing, and maintaining a variety of presentations, activities, and programs.
5. Research and reporting methods, techniques, and procedures.
6. Principles and practices of data collection and report preparation.
7. Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
8. Modern office practices, methods, and computer equipment and applications related to the scope of responsibility.
9. Record-keeping principles and procedures.
10. Techniques for effectively representing the College in contacts with governmental agencies, community groups, and various business, professional, educational, regulatory, and legislative organizations.
11. Techniques for providing a high level of customer service by effectively interacting with the public, vendors, students, and College staff, including individuals of various ages, disabilities, socio-economic levels and ethnic groups.

Skills & Abilities to:

1. Advocate for and communicate the College's vision and commitment to creating a diverse, equitable, inclusive, socially just, anti-racist, and accessible academic and work environment.
2. Participate in addressing gaps in diversity, equity, inclusion, social justice, anti-racism, and accessibility in the recruitment and retention of staff.
3. Participate in providing resources and support towards the goal of a diverse, equitable, inclusive, socially just, anti-racist, and accessible academic and work environment.
4. Evaluate and provide input to management regarding improvements to existing Financial Aid processes.
5. Present Financial Aid information verbally and in writing to various constituent groups such as students, families, Community Based Organizations for example "What is Financial Aid", "How to File for Financial Aid", "How to Apply for Scholarships." Prepare materials for outreach presentations, e.g. gathers brochures, reports, and other related program materials.
6. Provide sound advice and coaching to students related to financial aid programs and services.
7. Interpret, apply, explain, and ensure compliance with federal, state, and local policies, procedures, laws, and regulations.

8. Conduct research, analyze, interpret, summarize, and present technical information and data in an effective manner, especially regarding compliance with new financial aid rules and regulations.
9. Compose and prepare basic reports, correspondence, and other written materials independently or from brief instructions.
10. Make accurate mathematical, financial, and statistical computations.
11. Establish and maintain a variety of filing, record-keeping, and tracking systems.
12. Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
13. Communicate effectively through various modalities.
14. Learn and apply emerging technologies and, as necessary, to perform duties in an efficient, organized, and timely manner.
15. Review situations accurately and determine appropriate course of action using judgment according to established policies and procedures; understand scope of authority in making independent decisions.
16. Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.
17. Maintain current knowledge of federal and state financial aid programs and regulations through ongoing professional development and certifications as listed in the Licenses and Certifications section.

Education and Experience:

1. Equivalent to an associate's degree from a regionally or nationally accredited college with major coursework in finance, accounting, or a related field; and
2. Three (3) full-time equivalent years of increasingly responsible financial aid experience, including demonstrated knowledge of current federal and state financial aid regulations.

Desirable Qualifications:

1. Experience working with policies and procedures relating to diversity, equity, inclusion, social justice, anti-racism, and accessibility preferably in a minority serving institution such as Hispanic Serving Institution (HSI) and Asian American and Native American Pacific Islander-Serving Institution (AANAPISI); OR
2. Experience with participation in programs relating to diversity, equity, inclusion, social justice, anti-racism, and accessibility preferably in a minority serving institution such as Hispanic Serving Institution (HSI) and Asian American and Native American Pacific Islander-Serving Institution (AANAPISI).

Licenses and Certifications:

1. Regular participation in professional development opportunities related to supporting financial aid programs, including training in federal and state financial aid regulations.
2. The incumbent may periodically be required to travel to a variety of locations. If operating a vehicle, employees must have the ability to secure and maintain a valid California driver's license.

PHYSICAL DEMANDS

Must be able to work in a standard office setting and use standard office equipment, including technological devices; to communicate with individuals at various College and meeting sites; the ability to understand and comprehend written and electronic materials; the ability to receive, review, and respond to communications in person, before groups, and over and through various media. This is primarily a sedentary office classification although movement between work areas may be required. Positions in this classification occasionally may need to physically reach, push, and pull drawers open and closed to retrieve and file information. Incumbents must possess the ability to lift, carry, push, and pull materials and objects weighing up to 20 pounds.

ENVIRONMENTAL ELEMENTS

Incumbents work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Incumbents may interact with staff, students, and/or the public in interpreting and enforcing departmental policies and procedures.

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