

## **ASSISTANT DIRECTOR, FINANCIAL AID**

### **DEFINITION**

Under administrative direction, assists in planning, organizing, managing, and providing administrative direction and oversight of major functions and activities of the Financial Aid Department, including state and federal programs, veterans administration, scholarships, and other student financial assistance programs; assists in coordinating assigned activities with other District departments, divisions, outside agencies, and the public; provides highly responsible and complex professional assistance to the Director, Financial Aid in areas of expertise; acts as the Director, Financial Aid in his/her absence.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives administrative direction from the Director, Financial Aid. Exercises direct and general supervision over assigned staff.

### **CLASS CHARACTERISTICS**

This is an Assistant Department Director classification in the Financial Aid Department. The incumbent assists overseeing and directing and participates in major activities and programs of the Financial Aid Department, including providing professional-level support to the Director in a variety of areas. Assists in short- and long-term planning, development, and administration of departmental policies, procedures, and services. Successful performance of the work requires an extensive professional background, as well as, skill in coordinating departmental work with that of other District departments and divisions. Responsibilities include performing and directing many of the department's day-to-day administrative functions. This class is distinguished from the Director, Financial Aid in that the latter has overall responsibility for all financial aid programs, functions, and activities and for developing, implementing, and interpreting public policy.

### **EXAMPLES OF ESSENTIAL FUNCTIONS (Illustrative Only)**

1. Assumes management responsibility for major financial aid programs, services, and functions, including state and federal programs, veterans administration, scholarships, and/or other student financial assistance programs.
2. Manages and participates in the development and implementation of goals, objectives, policies, and priorities for assigned functions and programs; recommends, within departmental policy, appropriate service and staffing levels; recommends and administers policies and procedures.
3. Assists in managing, developing, and administering the department's budget; directs the forecast of additional funds needed for staffing, materials, and supplies; monitors and approves expenditures; directs and implements adjustments as necessary.
4. Selects, trains, motivates, and evaluates assigned personnel; provides or coordinates staff training; works with employees on performance issues; responds to staff questions and concerns; makes discipline recommendations to the Director.
5. Continuously monitors and evaluates the efficiency and effectiveness of service delivery methods and procedures; assesses and monitors workload, administrative

- and support systems, and internal reporting relationships; identifies opportunities for improvement and reviews with the Director; directs the implementation of improvements.
6. Directs the distribution, collection, review, and evaluation of student financial aid forms and applications; coordinates activities to ensure proper determination of student eligibility for financial aid programs; ensures proper comparison of individual financial needs with available aid; directs and participates in awarding of financial aid to eligible students.
  7. Participates in the preparation and maintenance of a variety of narrative, financial, and statistical reports, records, and files related to funds, students, awards, accounts, income, expenditures, and budgets; ensures mandated reports are completed and submitted to appropriate personnel or governmental agencies according to established timelines.
  8. Prepares applications related to the District's eligibility to receive state and federal funds.
  9. Serves as a point of contact for federal regulations and compliance regarding Title IV, Higher Education Act, and veterans services provisions; prepares for and responds to external and internal audits related to financial aid programs.
  10. Researches, secures, and maintains appropriate public and private sources of student assistance funding.
  11. Maintains close working relationship with the Foundation and Fiscal Services to monitor and accurately disburse funds to students.
  12. Maintains close working relationship with information technology staff and managers by providing technical expertise related to programming and implementation of financial aid technology.
  13. Coordinates with information technology in the development, implementation, and upgrade of application systems within the department.
  14. Compiles and analyzes statistical data and conducts surveys to identify trends and develop strategies for enhancing planning related to financial aid, veterans, and scholarship programs and services.
  15. Responds to requests for information and advises students, faculty, staff, visitors, and other District departments regarding financial aid policies and procedures.
  16. Serves as a liaison for the department with other District departments, divisions, and outside agencies; attends meetings in various locations; serves on various committees and task forces; participates in community events and workshops that provide information regarding departmental programs, projects, and services.
  17. Attends and participates in professional group meetings; stays abreast of new trends and innovations in the field of financial aid and other student support services as they relate to the area of assignment.
  18. Maintains and directs the maintenance of working and official departmental files.
  19. Monitors changes in laws, regulations, and technology that may affect District or departmental operations; implements policy and procedural changes as required.
  20. Responds to difficult and sensitive public inquiries and complaints and assists with resolutions and alternative recommendations.
  21. Acts as the Director, Financial Aid in his/her absence.
  22. Learns and applies emerging technologies and, as necessary, to perform duties in an efficient, organized, and timely manner.

23. Establishes, implements, and fosters an environment of belonging as it relates to diversity, equity, inclusion, social justice, anti-racism, and accessibility (DEISAA).
24. Oversees, leads, and provides high-level customer service when interacting with the public, vendors, students, and College staff, including individuals from minoritized groups.
25. Utilizes critical thinking, decision-making, and problem-solving skills with tact, confidence, and diplomacy.
26. Implements, enforces, supports, and abides by federal, state, and local policies and Board Policies and Administrative Procedures.
27. Participates in and supports employee participation on committees, task forces, and special assignments, including, but not limited to, Screening and Selection Committees, mandated trainings, and DEISAA related trainings as required.
28. Prepares and delivers DEISAA-minded presentations related to assigned areas as required.
29. Performs other related duties as assigned.

## **QUALIFICATIONS**

### **Knowledge of:**

1. Principles and practices of supporting a DEISAA academic and work environment.
2. Administrative principles and practices, including goal setting, program development, implementation, and evaluation.
3. Organizational and management practices as applied to the analysis and evaluation of projects, programs, policies, procedures, and operational needs.
4. Principles, practices, and techniques of financial aid programs and services.
5. Principles and practices of employee supervision, including work planning, assignment, review and evaluation, and the training of staff in work procedures.
6. Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to financial aid operations, including Title V regulations and California Education Code.
7. Modern office practices, methods, and computer equipment and applications, including word processing, database, and spreadsheet applications.
8. Record keeping principles and procedures.
9. Principles, practices, and techniques of effectively dealing with the public and basic public relations.
10. English usage, spelling, vocabulary, grammar, and punctuation.
11. Techniques for effectively representing the District in contacts with governmental agencies, community groups, and various business, professional, educational, regulatory, and legislative organizations.
12. Techniques for providing a high level of customer service by effectively dealing with the public, vendors, students, and District staff, including individuals of various ages, disabilities, various socio-economic and ethnic groups.

### **Skills & Abilities to:**

1. Implement, advocate for, and communicate the College's vision and commitment to creating a DEISAA academic and work environment.
2. Oversee and address gaps in DEISAA in the recruitment and retention of faculty and staff.
3. Critical thinking and decision-making through observing, analyzing, inferring, communicating, and problem-solving in challenging situations with tact, confidence, and diplomacy.
4. Assist in developing and implementing goals, objectives, policies, procedures, work standards, and internal controls for the department and assigned program areas.
5. Interpret, apply, explain, and ensure compliance with federal, state, and local policies, procedures, laws, and regulations.
6. Plan, organize, direct, and coordinate the work of assigned personnel.
7. Select, motivate, and evaluate the work of staff and train staff in work procedures.
8. Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
9. Effectively administer a variety of financial aid programs and administrative activities.
10. Effectively represent the District and the department in meetings with governmental agencies, contractors, vendors, and various businesses, professional, regulatory, and legislative organizations.
11. Prepare clear and concise reports, correspondence, policies, procedures, and other written materials.
12. Conduct complex research projects, evaluate alternatives, make sound recommendations, and prepare effective technical staff reports.
13. Establish and maintain a variety of filing, record keeping, and tracking systems.
14. 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.
15. Operate modern office equipment including computer equipment and specialized software applications programs.
16. Use English effectively to communicate in person, over the telephone, and in writing.
17. Understand scope of authority in making independent decisions.
18. Review situations accurately and determine appropriate course of action using judgment according to established policies and procedures.
19. Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

### **Education and Experience:**

*Any combination of training and experience which would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

1. Equivalent to graduation from a regionally accredited four-year college or university with major coursework in finance, accounting, business or public administration, counseling, education, or a related field; and
2. Three (3) years management and/or administrative experience in a college financial aid office.

**Desirable Qualifications:**

1. Proven track record of implementing or overseeing programs or policies relating to diversity, equity, inclusion, anti-racism, and accessibility, preferably in institutions serving minoritized populations such as Hispanic Serving Institutions (HSI) and Asian American and Native American Pacific Islander-Serving Institutions (AANAPISI); OR
2. Proven track record of participating in programs relating to diversity, equity, inclusion, anti-racism, and accessibility, preferably in institutions serving minoritized populations such as Hispanic Serving Institution (HSI) and Asian American and Native American Pacific Islander-Serving Institutions (AANAPISI).

**Licenses and Certifications:**

Possession of, or ability to obtain, a valid California Driver's License by time of appointment.

**PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various District and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 20 pounds.

**ENVIRONMENTAL ELEMENTS**

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

Amended: 8/2023