Position: Financial Aid Lead	**Position Number:**
Department/Site: Student Affairs	FLSA: Non-Exempt – (Classified CSEA)
Reports to: Director of Student Affairs, Financial Aid Services	**Salary Range:** 34

DESCRIPTION:

Under direction of the Director of Student Affairs, Financial Aid Services, or other administrator, the Financial Aid Lead works closely with the Director to ensure compliance with all associated reporting and auditing requirements, and coordinating the work of the department.

DISTINGUSHING CHARACTERISTICS: Financial Aid Lead is the highest-level classification in the financial aid series. The incumbent in this position performs technical work with a high degree of accuracy in planning, organizing, and implementation of financial aid programs with considerable degree of independence, thereby relieving the Director of a wide range of routine program administration functions. The Financial Aid Lead position serves as a data expert, who performs data analysis, ensures data integrity, and understands the business processes and functional needs of the financial aid module and configuration, regular use, and data structures used in the college's student information system. The incumbent is typically assigned to support all financial aid programs, assist the Director in the coordination of the work of the department, and any of the duties contained in the lower levels of this classification.

REPRESENTATIVE DUTIES:

The following is a list of duties that are representative of the position and include, but are not limited to, the following:

- Keep knowledge of financial aid regulations and procedures current through self-study and communication, and communicate changes to Director of Student Affairs, Financial Aid Services and other Financial Aid staff as assigned by the Director.
- Make recommendations to the Director of Student Affairs, Financial Aid Services to develop and modify work processes in response to legislative mandates and regulation changes.
- In coordination with the Director of Student Affairs, Financial Aid Services, prepare a variety of state and federal reports, state and federal audits, and institutional data requests; participate in program review activities; compose and/or edit a variety of publications, including class schedules; prepare budget reports, special reports, proposals, recommendations, and other materials as requested.
- Serve as the liaison between Financial Aid and other departments in coordinating financial aid workshops and presentations for students, their families, other educational institutions, and community-based organizations as requested.
- Coordinate with enrollment services and financial aid staff regarding area changes, updates, and activities.

- Provide technical information and assistance to students, staff, administrators, and others concerning financial aid and scholarships, interpret policies and regulations and determine appropriate courses of action in unusual and complex circumstances.
- Serve as the backup to the Director of Student Affairs, Financial Aid Services in calculating student academic progress status; overseeing communication of status, and supporting the coordination of the student academic progress appeal process, including serving as a committee functioning member.
- Process Board of Governor's Waiver (BOGW) applications and other fee waiver programs according to established procedures.
- Maintain external contacts with government agencies and other community colleges for the purpose of coordinating, obtaining, and verifying information; communicate decisions to students as needed.
- In coordination with the Director of Student Affairs, Financial Aid Services, design and implement continuous improvement programs in all Financial Aid Office processes, procedures, and technology use.
- Assist the Director of Student Affairs, Financial Aid Services in developing and conducting training for new staff and student workers; oversee student workers and develop their weekly work schedules.
- In coordination with the Director of Student Affairs, Financial Aid Services, maintain operational support of computer systems and their interfaces related to the financial aid module; including systems analysis to determine such things as solutions for implementation of new federal or state regulatory maintenance package, or implementation of a new state aid program, or troubleshooting interfaces with the Department of Education.
- Coordinate and collaborate with the College's Information Technology Resources Department and others regarding new, revised, and updated computerized system programs/processes within Financial Aid module.
- Serve on campus committees as assigned.
- Perform related duties as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES:

KNOWLEDGE OF:

- Rules, regulations, procedures, policies and function of federal, State and District financial aid programs, including but not limited to grant and loan programs, scholarships
- Personal and financial problems encountered by college students and parents
- Financial and statistical record-keeping techniques
- Modern office practices, procedures and equipment
- Oral and written communication skills
- College and community resources for students
- Applicable computer operation and software such as word processing, database, and spreadsheet programs
- Correct English usage, grammar, spelling, punctuation and vocabulary
- District organization, operations, policies and objectives
- Interpersonal skills using tact, patience and courtesy and that encourage collaboration and conflict resolution
- Technical aspects of field of specialty

SKILLS AND ABILITY TO:

- Ensure timely, efficient and effective delivery of services to students regarding financial aid, scholarships
- Analyze systems and processes, identify gaps or breakdowns, and identify solutions to address deficiencies
- Utilize District computer information systems and its Enterprise Resource Planning system of record to perform financial aid functions and ensure data and report accuracy and integrity
- Advise, counsel and interview students regarding financial aid programs
- Utilize and apply the technology of word processing, data base, and spreadsheet applications and quickly learn new programs
- Learn and apply applicable sections of the State Education Code and other laws and regulations, District organization, operations, policies and objectives.
- Communicate effectively in English both orally and in writing
- Prepare and maintain confidential and complex records and files
- Work independently with limited direction
- Interpret and communicate complex rules, regulations, policies and procedures effectively
- Establish and maintain effective working relationships with others
- Keyboard at a level sufficient to meet the needs of the position
- Make arithmetic calculations quickly and accurately
- Understand and follow oral and written directions
- Plan and organize work
- Analyze situations accurately and adopt an effective course of action
- Work effectively with frequent interruptions
- Train and provide work direction to others
- Utilize correct English usage, grammar, spelling, punctuation and vocabulary
- Understand and implement District operations, policies and objectives
- Keyboard at a level sufficient to meet the needs of the position
- Make arithmetic calculations quickly and accurately
- Conduct workshops and presentations for students, parents and other groups
- Meet schedules and time lines
- Understand and be sensitive to those of culturally, socioeconomically, and linguistically diverse backgrounds.

EDUCATION AND EXPERIENCE: Bachelor's degree or equivalent education, and five years of responsible experience in financial aid or a related function.

LICENSES AND OTHER REQUIREMENTS: Eligibility to access the National Student Loan Data System Some incumbents in this classification may be required to possess a valid CA driver's license and use of a personal vehicle.

PHYSICAL EFFORT/WORKING ENVIRONMENT: Office environment; constant interruptions; dexterity of hands and fingers to operate a computer keyboard; sitting for extended periods of time; bending at the waist, kneeling or reaching to retrieve file records.