



COORDINATOR, FINANCIAL AID

DEFINITION

Under general supervision, coordinates, promotes, implements, and provides student support services to the District's financial aid and related programs; processes and awards student financial aid according to federal and state regulations and District policies and procedures; organizes and maintains accurate and complete financial records; tracks students' academic progress; performs outreach duties to promote and increase participation in student financial aid programs; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from assigned supervisory or management personnel. Provides technical and functional direction to less experienced staff.

CLASS CHARACTERISTICS

This is the advanced journey-level classification in the Financial Aid series that is responsible for the administration and coordination of various financial aid and related processes and/or programs, as well as the operations and activities within the Financial Aid Office. Positions work on tasks that require the use of discretion and independent judgment in performing assigned work and ensuring the efficient and effective functioning of assigned operations. Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver work products or services. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements. This class is distinguished from the Supervisor, Financial Aid in that the latter is the full supervisory-level class responsible for organizing, assigning, supervising, and reviewing the work of assigned staff involved in financial aid support services.

EXAMPLES OF TYPICAL FUNCTIONS (Illustrative Only)

- Plans, coordinates, and administers assigned financial aid, scholarship, and student employment processes and/or programs, including developing and implementation of program policies and procedures, serving as the primary resource for assigned programs, and responsibility for program budget, performance, reporting, accountability, and regulatory compliance.
- Processes, analyzes, and evaluates application materials and supporting documentation to determine student eligibility for financial aid and scholarship programs.
- Performs functions necessary to implement and sustain the maintenance and use of financial aid databases and applications; tests and maintains data analysis and reporting programs to enhance and support reporting requirements and data tracking needs.
- Disburses financial aid and scholarships; coordinates the Award Notification Letter; posts to student accounts.
- Performs reconciliation of financial aid program accounts; calculates and processes overpayments and refunds to appropriate programs and funders.
- Oversees accurate and timely reporting of student and aid information to lenders, servicers, and guaranty agencies.
- Resolves complex and difficult cases in the financial aid, scholarship, and student employment eligibility determination, information verification, and appeal processes.

- Leads, plans, and organizes outreach activities targeting low-income or disadvantaged communities; recruits students to apply for financial aid and student employment programs; disseminates program information to high schools, local agencies, and the public; conducts presentations regarding scholarships and financial aid program services and opportunities.
- Markets programs, services, and events through Financial Aid website, various communication venues and social media; develops flyers, brochures, programs, and other marketing materials.
- Prepares and maintains various programmatic and/or student files and records.
- Oversees Financial Aid Office operations; provides technical and functional direction to assigned staff and student workers; gives work assignments; reviews and controls quality of work; trains staff in work principles, practices, methods, policies, procedures, and applicable federal, state, and local laws, rules, and regulations.
- Coordinates the development and implementation of special projects and programs as assigned.
- Maintains accurate and detailed spreadsheets, files, and records, verifies accuracy of information, researches discrepancies, and records information.
- Coordinates assigned activities and services with other departments, divisions, and outside agencies.
- Attends and participates in program-related District committees, community activities, and professional conferences and meetings concerned with the development and implementation of financial aid programs and/or services.
- Learns and applies emerging technologies and, as necessary, to perform duties in an efficient, organized, and timely manner.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Basic principles and practices of providing technical and functional direction to staff.
- Principles, practices, and service delivery needs related to the development and implementation of financial aid, scholarship, and/or student employment programs.
- Procedures for processing computer applications and databases in financial aid.
- Disbursement procedures and reconciliation process for federal and state aid.
- Procedures for planning, implementing, and maintaining a variety of presentations, activities, and programs.
- Research and reporting methods, techniques, and procedures.
- Principles and practices of data collection and report preparation.
- Applicable federal, state, local, and District policies, codes, regulations, technical processes, and procedures related to the program to which assigned.
- Modern office practices, methods, and computer equipment and applications, including word processing, database, and spreadsheet applications.
- Record keeping principles and procedures.
- Principles, practices, and techniques of effectively dealing with the public and basic public relations.
- English usage, spelling, vocabulary, grammar, and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, students, and District staff, including individuals of diverse academic, socio-economic, ethnic, religious, and cultural backgrounds, disability, and sexual orientation.

Ability to:

- Demonstrate understanding of, sensitivity to, and respect for the diverse academic, socio-economic, ethnic, religious, and cultural backgrounds, disability, and sexual orientation of community college students, faculty and staff.
- Implement and coordinate assigned program services, projects, and activities.
- Prepare outreach activities, brochures, reports, and other related program materials.
- Make oral presentations to a wide variety of audiences.
- Provide sound advice and coaching to students related to financial aid programs and services.
- Interpret, apply, explain, and ensure compliance with applicable federal, state, local and District policies, procedures, and regulations.
- Conduct research; analyze, interpret, summarize, and present technical information and data in an effective manner.
- Understand scope of authority in making independent decisions.
- Review situations accurately and determine appropriate course of action using judgment according to established policies and procedures.
- Compose and prepare basic reports, correspondence, and other written materials independently or from brief instructions.
- Make accurate mathematical, financial, and statistical computations.
- Establish and maintain a variety of filing, record keeping, and tracking systems.
- Organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- 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:

Equivalent to an Associate's degree in finance, accounting, or a related field and three (3) years of increasingly responsible experience in a financial aid office.

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, and to operate a motor vehicle 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. Standing in and walking between work areas is frequently 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 frequently bend, stoop, kneel, and reach to perform assigned duties, as well as 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 with the use of proper equipment. Reasonable accommodations will be made for individuals on a case-by-case basis.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances.

Salary Grade: C1-49

FLSA: Non-Exempt

EEO Code: H-50

Board Approved: April 2021