



JULY 2009
FLSA: EXEMPT

FINANCIAL AID COORDINATOR

DEFINITION

Under general direction, performs specialized duties related to the operation of the Financial Aid programs of the District; interviews, advises, and assists students with program services; processes and awards student Financial Aid according to Federal regulations and District policies and procedures; provides information to students and District staff regarding Financial Aid programs and services; provides assistance for a wide variety of assignments related to the development and implementation of program projects and services; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the Director of Financial Aid. May exercise technical or functional direction over lower-level staff and student workers.

CLASS CHARACTERISTICS

This classification is responsible for specialized assistance with program development, implementation, and outreach tasks. Incumbents perform the most complex, specialized, and responsible types of duties assigned, exercising a high level of independent judgment and initiative. Incumbents may provide functional and technical direction to student workers as a regular part of their work routine and are required to be fully trained in all procedures related to the assigned functional area. This class is distinguished from the Director of Financial Aid in that the latter has full oversight, policy development, implementation, and supervisory responsibility of the division.

EXAMPLES OF ESSENTIAL FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Participates in the development and implementation of goals, objectives, policies, and priorities for assigned services and programs; identifies resource needs; recommends and assists in the implementation of policies and procedures, including standard operating procedures for assigned programs and facilities.
- Performs the full range of routine to complex administrative and technical duties involved in processing and evaluating application materials and funding of financial aid opportunities to eligible students.
- Attends and participates in program-related community activities and professional conferences and meetings concerned with the development and implementation of Financial Aid programs and/or projects.
- Plans and organizes outreach activities targeting students eligible for special assistance and/or services.
- Conducts workshops on topics related to assigned program.

- Verifies initial and continuing eligibility of students who have applied for or been granted financial aid and informs affected students of their status.
- 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, Department of Defense and various State agencies used to determine financial aid eligibility, using Federal guidelines and forms.
- Analyzes and reviews applications and required documentation to determine financial need and program eligibility for a variety of Federal, State, and District programs.
- Packages financial aid awards using standard needs analysis as defined in Federal Title IV guidelines and in accordance with specific Federal, State and local guidelines.
- Reviews academic progress and monitors continued eligibility of students.
- Amends student awards according to changes.
- Prepares and maintains various programmatic and/or student files and records; monitors and tracks attendance and usage of assigned functional area and prepares reports for management.
- 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.
- Provides information to the public or District staff that requires the use of judgment and the interpretation of rules or procedures; meets with the public or District staff to obtain data, interpret information, and answer questions; prepares correspondence independently to answer questions, request information, or provide explanations.
- Coordinates special projects as assigned.
- Operates standard office equipment, including job-related computer hardware and software applications, facsimile equipment, and multi-line telephones; may operate other assignment-specific equipment; may perform basic maintenance and troubleshooting on assigned equipment.
- Maintains accurate records of work performed.
- May participate and assist in the administration of the assigned office; may organize and coordinate activities associated with the office; may recommend organizational or procedural changes affecting support activities.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles, practices, and service delivery needs related to the program area(s) to which assigned.
- Procedures for planning, implementing, and maintaining a variety of activities and programs.
- Federal, State, and local programs available to students requiring financial assistance, including the rules, regulations, policies, and procedures required of each.
- Applicable codes, regulations, policies, technical processes and procedures related to the program to which assigned.
- Business letter writing and the standard format for reports and correspondence.
- Principles and practices of data collection and report preparation.
- Business mathematics and basic statistical techniques.
- Recordkeeping principles and procedures.
- Modern office practices, methods, computer equipment and computer applications related to work, including word processing, database, and spreadsheet applications.
- English usage, spelling, vocabulary, grammar, and punctuation.
- 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, various socio-economic and ethnic groups.

Ability to:

- Coordinate assigned program operations and activities, including outreach activities, brochures, reports, and other related program materials.
- Interpret, apply, explain, and ensure compliance with applicable Federal, State, and local policies, procedures, laws, and regulations.
- Participate in the development of goals, objectives, policies, procedures, and work standards for assigned programs.
- Analyze, interpret, summarize, and present administrative and technical information and data in an effective manner.
- Prepare clear and concise reports, correspondence, policies, procedures, and other written materials.
- Effectively represent the District in meetings with governmental agencies, community groups, and various businesses, professional, and regulatory organizations, and in meetings with individuals.
- Respond to and effectively prioritize multiple phone calls and other requests for service.
- Compose correspondence and reports independently or from brief instructions.
- Make accurate mathematical, financial, and statistical computations.
- Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work.
- Establish and maintain a variety of filing, recordkeeping, and tracking systems.
- 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.
- 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.
- Use tact, initiative, prudence, and independent judgment within general policy and legal guidelines in politically sensitive situations.
- Establish, maintain, and foster positive and harmonious 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 graduation from an accredited four-year college or university with major coursework in accounting, business, finance, or a related field, and two (2) years of increasingly responsible experience related to the duties of the assigned program.

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, before groups, and over the telephone. This is primarily a sedentary office classification although standing in 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 weighing up to 25 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 upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.