

**FINANCIAL AID SUPERVISOR**

| **Reports to:**  | Director, Financial Aid & Scholarships |  |  |
| --- | --- | --- | --- |
| **Dept:** | Financial Aid | **Range:** | 30 |
| **FLSA:** | Exempt | **EEO:** | Professional/Nonfaculty |

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are not intended to reflect all duties performed by individual positions.*

### BASIC FUNCTION:

Under direction, lead and participate in major activities and programs of the Financial Aid department; provide technical expertise to students, Financial Aid staff and district personnel concerning financial aid policies, procedures and regulations; assists in short and long term planning; package and certify financial aid applications in accordance with complex federal, state and local requirements; develop, recommend and implement financial aid policies and procedures; determine financial aid eligibility, calculate, initiate and authorize disbursements, fund management; monitor and reconcile expenditures; supervise and coordinate the work of Financial Aid staff; performs the duties of the Director, Financial Aid & Scholarships in his/her absence or as assigned.

### DISTINGUISHING CHARACTERISTICS*:*

A Financial Aid Supervisor is distinguished from a Financial Aid Technician in that an incumbent in the former class provides technical work direction to other staff.

### ESSENTIAL DUTIES & RESPONSIBILITIES:

*The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class.*

1. Plan, assign, schedule, supervise and evaluate the work of assigned staff; with staff, develop, implement and monitor operational plans to achieve assigned unit objectives; provide input to the annual budget; make purchases and other expenditures in accordance with district procedures and monitor performance against the annual budget; participate in developing, implementing and evaluating plans, processes and procedures to achieve established goals and objectives in accordance with department standards; prepare and maintain a variety of records and reports.
2. Interview and participate in selecting new department staff; supervise and evaluate staff performance; establish performance requirements and personal development targets; regularly monitor performance and provide training, coaching and mentoring for performance improvement with management concurrence, implement the progressive discipline process to address performance deficiencies, in accordance with district human resources policies and classified employee manual.
3. Provide day-to-day leadership and work with staff to ensure a high-performance, service-oriented work environment that supports achieving district and division mission, objectives and service standards; enforce the maintenance of safe working conditions and ensure safe work practices are followed by staff; provide leadership to ensure a fair and open work environment in accordance with the district’s mission, goals and values.
4. Interpret, analyze and apply complex laws, rules and regulations related to state and federal financial aid programs; implement changes and advise other staff to assure continued program compliance. Advise other staff concerning changes in policies, regulations and technical procedures and provide direction and assistance for implementation.
5. Maintain and audit the computerized disbursement module; prepare and input data for funds disbursement and coordinate with other district personnel and departments, including Fiscal Services, Student Accounts, and Admissions and Records, to ensure timely and accurate financial aid disbursements.
6. Verify and audit all federal, state and institutional financial aid program expenditures, including Pell Grant, Cal Grant, Full Time Student Success Grant, Afghanistan and Iraq Grant, Federal Supplemental Education Opportunity Grant, federal work study and direct loan programs; reconcile expenditures monthly with Fiscal Services; verify availability of funds; research and analyze transactions to resolve disbursement and budget issues as they arise.
7. Interview applicants to determine eligibility for financial assistance; assist students in apply­ing for funds; perform needs analyses; package and authorize financial aid awards in com­pliance with federal, state and local regulations and district policies; determine eligibility and authorize awards under the Pell Grant, BOGW, Federal Supplemental Opportunity Grant, Full Time Student Success Grant, Extended Opportunity Grant, Iraq and Afghanistan Service Grant, Federal Work Study, Stafford Loans, Cal Grant A, B and C, BIA, CARE, scholarships, private loan, Real Estate Scholarships, Middle Class Scholarships, and Chafee programs; certify Gilman Scholarship nominees for study abroad programs.
8. Monitor and evaluate internal operating procedures; determine, recommend, and implement changes needed in business processes to accommodate changes in federal, state, and district regulations; assist in designing forms, brochures, and letters. Compose and prepare a variety of correspondence related to financial aid programs.
9. Coordinate with other departments to ensure timely receipt of information and records to determine eligibility, process applications and authorize disbursements; serve as Financial Aid liaison to the California Student Aid Commission, state, federal and private agencies, Fiscal Services office, Spartan Bookstore, U.S. Department of Education, U.S. Department of Collections and others; serve as National Student Loan Clearinghouse Financial Aid resource to students and staff.
10. Using PeopleSoft, write queries and extract, verify, compile, analyze and format data from college and federal databases for planning, decision making, evaluation, research projects, and accountability purposes; develop and maintain data and reports to support program audits and for other purposes; compile, verify, and submit data for annual FISAP (Fiscal Operations Report and Application to Participate), prepare electronic report for sign-off by the Superintendent/President; compile ,verify data, and submit annual MIS submission. Complete and submit monthly budget and expenditure report to the Chancellor’s Office to ensure proper funding.
11. Complete annual year-end closeout of all financial aid programs and submit final balance sheet to Department of Education for the Direct Loan Program.
12. Provide guidance, work direction and assignment to the Systems and Procedural Analyst (Business Systems Analyst). Develop, update, and recommend changes to the PeopleSoft procedures and processes; conduct setup and testing for financial aid processing. Assist in maintenance of the Financial Aid PeopleSoft Procedures manual. Facilitates trouble shooting and monitoring financial aid PeopleSoft functions.
13. Set up and maintain annual packaging policy based on updated regulations and assessed impact to financial aid programs. Determine and continually monitor annual fund allocations for all financial aid recipients to ensure proper management of each program; determine annual fund limits for campus based aid based on statistical reports and multi-year fund allocations; provide budget and funding management for all financial aid funds. Complete College Cost Estimator for California Student Aid Commission determination of Cal Grant funding.
14. Assists in implementing procedural standards and set-up rules that determines qualitative and quantitative federal academic progress compliance that calculates each financial aid student at the end of each term; validate compliance standards are accurately implemented; maintain database records; ensure proper mass notification to students of compliance/non-compliance including withdrawal of federal aid awards based on non-compliance.
15. Determine eligibility for emergency loans; authorize emergency loan expenditures; review and troubleshoot systematic failure of federal loan applications, provide guidance and sign off on approval of Financial Aid Technicians’ professional judgment cases.
16. Serve as Primary Destination Point Administrator for the Student Aid Internet Gateway (SAIG). Provide and remove access for financial aid staff for federal systems. Keep hardcopy records as required by federal guidelines. Serve as primary System Administrator for WebGrants portal. Complete and remove security and access to required applications and PeopleSoft functions for staff members.

### OTHER DUTIES:

1. Maintain current knowledge concerning revisions in federal, state, local and campus regula­tions, policies and procedures; advise staff concerning changes in policies, regulations and technical procedures and provide direction and assistance for implementation.
2. Provide technical expertise regarding financial aid policies and regulations to students, parents and staff.
3. Act in the absence of the Director of Financial Aid & Scholarships, as assigned.
4. Perform related duties as assigned.

### KNOWLEDGE AND ABILITIES:

### KNOWLEDGE OF:

1. District organization, operations, policies and objectives.
2. Applicable federal, state and local laws, rules and regulations pertaining to the financial aid program.
3. Financial and statistical recordkeeping techniques.
4. Interviewing and counseling techniques.
5. Budget management.
6. Report preparation.
7. Safety policies and safe work practices applicable to the work.
8. Basic principles and practices of effective employee supervision.
9. Principles and practices of sound business communications, including correct English usage, grammar, spelling and punctuation.
10. District human resources policies and classified employee manual provisions.

### ABILITY TO:

1. Plan, supervise, assign, review and evaluate the work of staff engaged in Financial Aid work.
2. Analyze problems, evaluate alternatives and recommend or adopt effective courses of action.
3. Participate in planning, organizing and overseeing financial aid programs and office services.
4. Perform difficult financial and statistical recordkeeping for a variety of federal and state financial aid programs.
5. Set priorities and exercise independent judgment within areas of responsibility.
6. Communicate effectively, both orally and in writing.
7. Understand, interpret, explain and apply applicable laws, codes and regulations.
8. Present proposals and recommendations clearly, logically and persuasively.
9. Operate a computer and use standard business software.
10. Use tact and diplomacy in dealing with sensitive and complex issues, situations and concerned people.
11. Demonstrate sensitivity to and understanding of diverse academic, socioeconomic, cultural, ethnic and disability issues.
12. Establish and maintain effective working relationships with all those encountered in the course of work.

### EDUCATION AND EXPERIENCE:

Graduation from an accredited four-year college or university with a bachelor’s degree and at least three years of progressively responsible experience in financial aid; or an associate’s degree and seven years experience in financial aid.

### LICENSES AND OTHER REQUIREMENTS:

A valid California driver’s license and the ability to maintain insurability under the district’s vehicle insurance program.

**WORK DIRECTION, LEAD AND SUPERVISORY RESPONSIBILITIES:**

Business Systems Analysts, Financial Aid Technicians and other Financial Aid staff, temporary workers and student workers.

**CONTACTS:**

District administrators, faculty, staff, students, other college and community organizations, Federal and Public agencies, vendors, contractors and the general public.

**PHYSICAL EFFORT:**

*The physical efforts described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Primarily sedentary with intermittent standing, walking, bending and stooping; occasional light lifting and carrying of objects weighing up to 25 pounds; ability to travel to various locations on and off campus as needed to conduct district business.

**EMOTIONAL EFFORT:**

Ability to develop and maintain effective working relationships involving interactions and communications personally, by phone and in writing with a variety of individuals and/or groups from diverse backgrounds on a regular, ongoing basis; ability to work effectively under pressure on a variety of tasks concurrently while meeting established deadlines and changing priorities.

**WORKING CONDITIONS:**

Primarily business office environment; subject to frequent public contact and interruption and intermittent exposure to individuals acting in a disagreeable fashion. Occasional evenings and/ or weekends are required on an as-needed basis. Occasional travel may be requested.