Type of Action Requested:* Replacement
Internal Team:* SL-ARF-Financial Aid-122300
Job Code/Employee Classification:* SSP II
Classification Title: Student Services Professional II
MPP Job Code: Financial Aid Scholarship Coordinator
Position Number: Position no: SL-00010261
CSU Working Title:* Financial Aid Counselor
Salary Range/Grade: 3082-RANGE A-Grade-1
Minimum: $ 4,304.00
Maximum: $ 6,120.00
Pay Frequency:
Reports To: Assist Director Scholarships
Campus:* San Luis Obispo
Division:* Academic Affairs-Provost
College/Program:* Admissions, Recruit&FinAid
Department:* ARF-Financial Aid - 122300
FLSA Status:* Exempt

Sensitive Position:

Yes
No

Job Summary/Basic Function:* The Financial Aid Office is responsible for the determination of eligibility for and awarding of federal, state, institutional and private grants, scholarships, and work and loan programs in excess of $150M annually to over 13,000 eligible students. The office is responsible for adhering to the regulatory requirements as outlined in federal and state regulations as well as donor and institutional policies and for assuring compliance by the University. The Financial Aid Office serves the University by assisting students in obtaining financial aid and scholarships to attend Cal Poly. The Office’s primary function is to provide appropriate financial aid based on federal and state parameters and in keeping with CSU and Cal Poly institutional policies.

Under the general direction of the Assistant Director of Scholarships, this position assists the university in retaining and graduating students needing financial assistance through a comprehensive program of financial aid and support services. Financial Aid program offerings include grants, loans, work-study opportunities and scholarships. In accordance with state and federal regulations, a proactive approach will be used to meet and monitor students’ financial need.

Minimum Qualifications:* Bachelor’s degree and two years of professional experience in one of the student services program areas or in a related field; OR a Master’s degree and one year of experience.
### Required Qualifications:

- General knowledge of research and interview techniques, including the ability to obtain factual information through interviews.
- General knowledge of the principles of individual and group behavior.
- Ability to advise students individually and in groups on routine matters.
- Excellent organizational and time management skills with the ability to manage a caseload and set own priorities to coordinate multiple assignments with fluctuating and time-sensitive deadlines.
- Ability to successfully interact with a diverse student population and to assess student needs.
- General knowledge of or the ability to quickly learn university-wide student services programs.
- General knowledge of or the ability to quickly learn admissions, academic records, and student accounts procedures and practices and how they interface with financial aid procedures.
- Ability to adapt to the dynamic environment of student aid.
- Demonstrated customer service skills, including a high level of diplomacy and professionalism.
- Ability to use tact and diplomacy to effectively handle a broad range of high level and sensitive interpersonal situations with diverse personalities, and to respond appropriately to conflicts and problems.
- Ability to initiate, establish, and foster communication and teamwork by maintaining a positive, cooperative, productive work atmosphere in and outside the University with the ability to establish and maintain effective working relationships within a diverse population and with those from various cultural backgrounds.
- Excellent communication skills; ability to effectively communicate information in a clear and understandable manner, both verbally and in writing.
- Thorough knowledge of English grammar, spelling and punctuation.
- Ability to interpret, communicate, and apply policies and procedures.
- Demonstrated ability to maintain a high degree of confidentiality.
- Excellent computer skills and proficiency with a variety of computer applications including word-processing, spreadsheets, databases, on-line systems, Internet as well as online calendaring and email.
- Working knowledge of or ability to quickly learn University infrastructure, policies and procedures and university wide student services programs.
- Ability to work in a high energy, fast-paced environment and respond in a positive, supportive and professional manner.
- Knowledge and understanding of office operations and procedures.
- Demonstrated skills in an institutional or educational environment utilizing a customer-oriented and service-centered attitude.
- Experience with MS Word and Excel.
- Experience working at a university or community college.
- Experience using student administration systems such as PeopleSoft.

### Preferred Qualifications:
**Special Conditions:**

Must be able to successfully pass a pre-employment background/fingerprint check.

Must be willing to travel and attend training programs off-site for occasional professional development.

Must be able to work extended hours, occasional holidays, and adjust working hours to meet organizational needs. May be called back periodically to perform work as needed on an emergency basis.

The person holding this position is considered a 'mandated reporter' under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083 as a condition of employment.

Must be able to successfully pass a pre-employment background/fingerprint check.

This position classification has been defined as "Exempt" and is not subject to the overtime provisions of the Fair Labor Standards Act (FLSA).

Must not be in default on a federal student loan or owe a repayment of a federal grant.

**License / Certification:**

N/A

**Mandated Reporter:** General - The person holding this position is considered a general mandated reporter under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083, revised July 21, 2017.

**NCAA:**

- Yes
- No

**Conflict of Interest:** None

**Supervises Employees:**

- Yes
- No

---

**Job Duties**

---

**JOB DUTIES**

<table>
<thead>
<tr>
<th>% of time</th>
<th>Duties / Responsibilities</th>
<th>Essential / Marginal</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Support a case-load of high-impact scholarship recipients, act as an advocate and point-of-contact for students when they need advice and direction, and help students get to the right resources to maintain their success at Cal Poly.

Connect with scholarship recipients providing detailed analysis and effective assessment of student financial and developmental needs.

Assist with scholarship decisions, awarding, revisions and renewal.

Advise students regarding factual data regarding personal budget management, financial planning and other guidance counseling which may affect student academic performance and continued eligibility for assistance.

Counsel students on university's Satisfactory Academic Progress (SAP) policy. Encourage students to develop a realistic plan of study to ensure they stay within the rules mandated by SAP. Review and make determinations regarding individual appeals for reinstatement, often without precedence.

Prepare, conduct and/or participate in financial aid workshops and presentations.

Prepare, review, and revise award packages. Award grants, loans, and work-study as appropriate. Coordinate outside resources including scholarships, loans, and grants with federal and state funds.

Revise and adjust award packages or budgets as necessary and ensure funds are not over awarded.

Keep abreast of federal, state, institutional and departmental regulations and policies. Provide input in relation to various office policies and procedures.

Provide general admissions information to parents, students, and other interested audiences.

Participate in outreach activities both on- and off-campus in the recruitment and retention effort of students from low income, disadvantaged backgrounds, and underrepresented groups.

Attend office, counseling staff, and divisional staff meetings.

Perform other job-related duties and special projects as assigned.

Attend training and maintain skill currency as appropriate to safely and effectively complete assignments.

SELECTION CRITERIA

POSTING DETAILS

Advertising Summary:

The Financial Aid and Scholarship Office is seeking a Scholarship Counselor who will monitor and assist students receiving high impact scholarships, as well as work with the Assistant Director of Scholarships to identify eligible students for Cal Poly scholarships, communicate and award internal scholarships.

Advertisement text:*
Job Summary

Under the general direction of the Assistant Director of Scholarships, this position assists the university in retaining and graduating students needing financial assistance through a comprehensive program of financial aid and support services. Financial Aid program offerings include grants, loans, work-study opportunities and scholarships. In accordance with state and federal regulations, a proactive approach will be used to meet and monitor students' financial need.

Department Summary

The Financial Aid Office is responsible for the determination of eligibility for and awarding of federal, state, institutional and private grants, scholarships, and work and loan programs in excess of $150M annually to over 13,000 eligible students. The office is responsible for adhering to the regulatory requirements as outlined in federal and state regulations as well as donor and institutional policies and for assuring compliance by the University. The Financial Aid Office serves the University by assisting students in obtaining financial aid and scholarships to attend Cal Poly. The Office’s primary function is to provide appropriate financial aid based on federal and state parameters and in keeping with CSU and Cal Poly institutional policies.

Key Qualifications

- Support a case-load of high-impact scholarship recipients, act as an advocate and point-of-contact for students when they need advice and direction, and help students get to the right resources to maintain their success at Cal Poly.
- Connect with scholarship recipients providing detailed analysis and effective assessment of student financial and developmental needs.
- Assist with scholarship decisions, awarding, revisions and renewal.
- Advise students regarding factual data regarding personal budget management, financial planning and other guidance counseling which may affect student academic performance and continued eligibility for assistance.
- Counsel students on university’s Satisfactory Academic Progress (SAP) policy. Encourage students to develop a realistic plan of study to ensure they stay within the rules mandated by SAP. Review and make determinations regarding individual appeals for reinstatement, often without precedence.

Education and Experience

Bachelor's degree and two years of professional experience in one of the student services program areas or in a related field; OR a Master's degree and one year of experience.

Salary:

Anticipated Hiring Range: $51,648 - 54,000 per year

Classification Range: $51,648 - $73,440 per year

Cal Poly

Known for its Learn by Doing pedagogy, Cal Poly is the flagship of the world-renowned California State University system. Annually recognized as one of the top public universities in the nation, Cal Poly continues to offer an academic curriculum based on learned experience gained through real-world practice. Located in San Luis Obispo, Cal Poly is nestled comfortably among the coastal foothills, minutes from the Pacific Ocean and equidistant to the Bay Area and Los Angeles.

Cal Poly offers a best-in-class benefits program, including health, dental and vision insurance, retirement participation in the Public Employees’ Retirement System, and educational benefits for eligible employees. See our benefits website for additional information.

Diversity Statement

At Cal Poly, we believe that cultivating an environment that embraces and promotes diversity is fundamental to the success of our students, our employees and our community. Bringing people together from different backgrounds, experiences and value systems fosters the innovative and creative thinking that exemplifies Cal Poly's values of free inquiry, cultural and intellectual diversity, mutual respect, civic engagement, and social and environmental responsibility.

Cal Poly's commitment to diversity informs our efforts in recruitment, hiring and retention. California Poly is an affirmative action/equal opportunity employer.
Supplemental Information

Following a conditional offer of employment, a background check (including a criminal records check) must be completed satisfactorily before any candidate may start work with Cal Poly. Failure to satisfactorily complete the background check may result in the withdrawal of the offer of employment. Current employees who are offered positions on campus will be required to undergo a background check for any position where a background check is required by law or that Cal Poly has designated as sensitive.

The person holding this position is considered a ‘mandated reporter’ under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083 as a condition of employment.

This position may be “Designated” under California State University’s Conflict of Interest Code. This would require the filing of a Statement of Economic Interest on an annual basis and the completion of training within 6 months of assuming office and every 2 years thereafter.

Cal Poly, San Luis Obispo is not a sponsoring agency for staff positions (i.e. H-1B visas).

**USERS AND APPROVALS**

**Justification for Position:**
This is to hire an SSPII to replace the position #00010281 that Defina Medina vacated. We are downgrading the position to an SSPII from and SSPII.

**Hiring Administrator:** Gerrie Hatten

**Approval process:**
SL - Staff - Replacement PD - Edits

1. Appropriate Administrator:
   - Gerrie Hatten ✓ Approved Feb 27, 2020

2. A&F Human Resources:
   - Quinn Tanner ✓ Approved Feb 27, 2020

**HR/Faculty Affairs Representative:** Quinn Tanner