

POSITION DESCRIPTION

Position descriptions are the foundation for recruiting, classification decisions and performance evaluations. A position description is maintained in Human Resource Management for all staff and management employees describing current job duties and responsibilities. Position descriptions should be updated as needed to reflect current duties and submitted to Human Resource Management for review. New employees should review and discuss their position description with their Appropriate Administrator.

Action Requested: *Organizational Chart required for all actions.*

- ☒ Review of a new or vacant position
- ☐ Initiate a classification review
- ☐ Update an existing position description (no review requested)

Name of incumbent (if filled position):		
<i>If vacant, name of previous incumbent:</i>		
Working Title: Associate Director, Financial Aid & Scholarships		
Classification Title: Administrator I		
Department Name: Financial Aid & Scholarships		Division: Student Affairs
Appropriate Administrator/Supervisor Title: Deborah Brandon/AVP Enrollment Management		
Position Number: 00000694	Job Code: 3318	Grade Level: 1
Time Base: 1.0	FLSA Status: Exempt	

Position Summary: *In a few sentences, briefly describe the primary function of the position.*

Under the general direction of the Financial Aid Director, the Associate Director of Financial Aid and Scholarships is responsible for planning, organizing and supervising the work of the Financial Aid staff within the Office of Financial Aid and Scholarships. The incumbent will assume responsibility for assisting in the implementation of federal and state regulations, and policies and procedures. Perform quality control of staff assignment. The Associate Director shall review and participate in the handling of unusual cases, hearing students appeals that relate to need determination and award policies. The incumbent will be responsible for providing annual Verification training for the Financial Aid Specialist staff and maintaining the policies and procedures manual. The Associate Director will also serve as Acting Director when the Director is absent from the office.

Major Duties:

Describe the major responsibilities assigned to this position (typically 5 to 7) listing them in order of importance. Indicate the approximate percentage of time spent in each area of responsibility, estimated over a year timeframe (Minimum of 5% for a given duty. Primary responsibilities should represent the majority of the time allocation, with the total equaling 100%). Miscellaneous or other duties should be 5%.

Indicate duties, which are “**essential functions**” by checking the Essential Function box in the right column.

The Americans with Disabilities Act (ADA) provides that there shall not be a barrier to employment for an otherwise qualified disabled individual who is able to perform the “**essential functions**”, which is intrinsic to the work. **A function may be essential because 1) the position was established to perform the function; 2) a limited number of employees are available to perform the function; and/or 3) removing the function would fundamentally change the position.** (Example: A receptionist must be able to respond to in-person, telephone and electronic inquiries).

Description of Duties	% of Time Total = 100	Essential Function
Leadership & Development: -Responsible for the monitoring and coordination of activities related to the Financial Aid professional and para-professional staff. -In accordance with collective bargaining contracts and University personnel policies and procedures, the Assistant Director is responsible for selection, training, supervising and evaluating of staff, participates in discipline; participates in the handling of grievances; verification of hours worked; evaluation and leave requests; authorizations for leave time for class attendance and approval of requests for modifications of work schedules; and provide opportunities	40%	<input checked="" type="checkbox"/>

for professional development. -Conducts on-going reviews of the quality of the work and work assignments and coordinates activities and priorities to ensure maximum productivity and a high-level of quality service to students, the campus and all outside agencies.		
Policy & Compliance: -Participates with management on policies and program development and supervises the Financial Aid professional and para-professional staff and ensures compliance with all state and federal financial aid laws, policies, and regulations. -In accordance with federal, state, CSU and campus policies and procedures governing the awarding of Financial Aid to students, determines aid eligibility, recalculates need based upon verification of documentation, processes awards on-line, document changes, and monitors academic progress. -Interviews and counsels students. Assists students in the completion of forms in individual or group settings. Advise students on: needed documentation, different aid programs and their differences, debt management, and regulations such as citizenship verification and Selective Service. Explains the basis of award determination to students verbally and in writing. -Responsible for maintaining and updating all procedures that are integral to awarding state, federal, and other financial aid, including all interfaces with PeopleSoft; responsible for the integrity of the data captured and entered by the Specialist staff. -Prepares reports as necessary for adequate communication with the office and between the Office of Financial Aid and Scholarships and other campus offices, the Chancellor's Office, various local, state and federal agencies. -Makes analyses of policies and procedures incorporated by other colleges and universities that pertain to financial aid processing, evaluation of records, default rates and/or improvement of existing policies.	40%	<input checked="" type="checkbox"/>
Services Support, Boards & Committees: -Serves on various University committees and with community and professional groups as a representative of the office for the purpose of explaining, clarifying or integrating the operations of the office with other programs of the university and communities serviced. - Researches and prepares briefings for the Director of Financial Aid on all matters concerning student discipline when related to financial aid.	15%	<input type="checkbox"/>
Other duties as assigned.	5%	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Changes in position: *If this is an existing position that you believe has changed, what specific duties or responsibilities have been changed, added to, or removed since the position was reviewed previously or since the incumbent was assigned?*

Physical Effort: *Indicate the type of physical effort which is essential to the position activities:*

Sedentary Work - involves mainly sitting; walking and standing are minimal; involves lifting light weight objects limited to 15 pounds.

Environmental Factors: *Indicate the type(s) of environmental factors which are essential to the position activities:*

<input checked="" type="checkbox"/> Inside (Typically Office Environment) Frequency: <u>Occasionally - Essential</u>	<input type="checkbox"/> Extreme Temperature (hot/cold) Frequency: Choose an item.	<input type="checkbox"/> Elevated Work (Raised platform/scaffold) Frequency: Choose an item.
<input checked="" type="checkbox"/> Outdoor Frequency: <u>Occasionally</u>	<input type="checkbox"/> Hazards Frequency: Choose an item.	

Supervision Received: *Indicate the level of supervision received by the position from the Appropriate Administrator.*

General Direction - general control over administrative aspects of work; plans and organizes methods for completing tasks and managing responsibilities; makes decisions which have a wide impact on the work of others or the work unit.

Supervision Exercised: *Indicate the type of supervisory responsibilities that are associated with the position.*

Manages a unit/function.

Specialized Materials: *The position may require the use of the following equipment, machinery, tools, vehicles or office equipment:*

California Driver License Required

Special Working Conditions: *List any overtime requirements, 24/7 on-call, work schedule, etc.*

Knowledge, Skills, and Abilities:

Working knowledge of the practices and activities of the Financial Aid Office and any other duties as assigned; general knowledge of the methods and problems of organizational and program management; general knowledge of research and interview techniques; and general knowledge of individual and group behavior principles. Additionally, knowledge of the principles and methods utilized for financial and personal management and budgetary preparation and control; general knowledge of modern office and data handling methods, forms, and equipment related to the Office of Financial Aid and Scholarships.

Skills:

Communicate verbally and in writing with students, parents, staff, and outside organizations. Use problem-solving skills to thoroughly resolve student concerns, using reasonable time management and organizational skills.

Abilities:

Ability to interpret and apply program rules and regulations; ability to use initiative and resourcefulness in planning work assignments and in implementing long-range program improvements; ability to obtain factual and interpretative information through interviews; ability to reason logically; ability to collect, compile, analyze and evaluate data and make verbal and written presentations based on these data, ability to advise students individually and in groups on routine matters where required; ability to recognize multicultural, multi-sexed and multi-aged value systems and work accordingly; ability to establish and maintain cooperative working relations with faculty, CSU administrators, student organizations, private and public agencies and other committee work and student advising and community contracts; and ability to rapidly acquire a general knowledge of the overall operation, functions and programs of the campus.

Experience and Education:

Experience/Education: Professionals at this level usually have three - five (3-5) years of experience and/or the equivalent to a Bachelor's degree. One (1) year of supervisory/managerial or leadership experience required.

Preferred Qualifications and/or Specialized Skills and Abilities: (if none, write N/A):

Signatures (Acknowledgement that the information is accurate)

Name of Employee:	Signature:	Date:
Name of Supervisor/Dept. Manager:	Signature:	Date:

For HR Use Only

Classified By: Adriana Godoy Date: 4.22.24

☒ General Reporter ☐ Limited Reporter ☒ Background Check ☐ Fingerprints ☐ Physical Exam
☒ Driver's License ☒ Conflict of Interest ☒ MPP Job Code R066