



## **DIRECTOR OF FINANCIAL AID AND BASIC NEEDS**

Classification: Classified Administrator  
Salary Range: 13

Retirement Type: PERS\*  
Revised/Board Approval: June 17, 2024

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### **KEY ROLES/RESPONSIBILITIES**

Under the direction of the Dean of Enrollment Services, exercise direct leadership of the areas assigned providing functional supervision over assigned positions. Implement the Division's, department's or unit's vision and develop, organize, and implement goals and objectives; plan, develop, organize schedule, direct, improve and evaluate assigned programs, services, and activities; and provide oversight, development, and coordination of all elements of the areas assigned, including ensuring compliance with federal, state, and institutional policies, procedures, and regulations that pertain to eligibility determination, awarding and disbursement of financial aid.

Foster a culture of collaboration, mutual respect, innovation, and continuous improvement throughout the assigned unit, department, and Division; lead by example; actively participate in and support College-wide shared governance components and activities and other collaborative processes; encourage professional excellence among assigned staff; and promote, foster, and facilitate an organizational culture of customer service, teamwork, and innovation.

### **SUPERVISION RECEIVED and EXERCISED**

- Receive general direction from the Dean of Enrollment Services.
- Supervise, motivate, and evaluate the performance of assigned staff, interview and select employees; recommend promotions, transfers, reassignment, termination, and disciplinary actions to the assigned reporting level.
- Review and recommend staffing patterns, approve goals and performance objectives for personnel.
- Provide consistent direction in administering the collective bargaining agreements with faculty and classified employees; understand and interpret agreements for faculty and staff as directed.
- Foster a culture of sensitivity to and an understanding of the diverse academic, socioeconomic, cultural, linguistic, ethnic backgrounds and disabilities of community college students, faculty, and staff.

## **REPRESENTATIVE DUTIES**

*The following duties and responsibilities are typical for this position. Incumbents may not perform all the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices.*

### **I. LEADERSHIP**

1. Lead, direct, and manage the planning, development, organization, scheduling, direction, performance, and evaluation of programs and services of assigned departments or units. Articulate a clear vision of assigned areas, including services, applications, and benefits provided. Lead and manage change within assigned departments or units and across the Division as directed.
2. Actively participate in long-range planning, program review, and resource development activities. Promote transparency within and among assigned units or departments.
3. Participate actively in the life of the College, including operational processes and initiatives, by serving on College committees, workgroups, task forces, and councils as assigned.
4. Strengthen quality educational and support services to promote and empower student learning, success, and self-advocacy. Prepare and implement the department's budget.
5. Enhance innovation and participation in issues related to areas of assignment to ensure ongoing sustainability of the College.
6. Support student learning using a variety of effective instructional methods, educational technologies, and college resources.
7. Be accountable for effective and efficient utilization of resources. Control and authorize expenditures in accordance with established guidelines. Measure and assess outcomes. Identify opportunities for improvement within assigned areas and implement actions to strengthen services to students and the campus community.
8. Support and promote College initiatives including Diversity, Equity, Inclusion, Accessibility and Anti-racism.
9. Serve as Campus Security Authority (CSA) for Clery Act reporting requirements. Maintain up-to-date certification for CSA status.

### **II. FUNCTIONAL RESPONSIBILITIES: College Level**

1. Provide effective leadership and ongoing guidance over all aspects of the areas assigned, including resource planning, budgeting, tracking, and reporting. Provide technical expertise as directed.
2. Monitor and improve the delivery of services throughout the areas assigned. Promote an effective work environment that supports high performance teamwork, continuous improvement, and ongoing sustainability of College resources.
3. Support the fiscal integrity of the College to promote and empower student learning, success, and self-advocacy.
4. Participate in grievances, disciplinary meetings, legal matters, and other employment related activities within areas assigned. Be alert for and effectively manage trouble spots in assigned service areas.

5. Provide timely operational, technical, and functional information to the Department Head, Vice President, and other College administrators, as directed. Interpret routine policies and regulations and recommend appropriate courses of action in unusual and complex circumstances. Demonstrate effective stewardship through continuous monitoring and reporting of resource needs, deployment, and utilization.
6. Ensure that all programs, services, activities, events, and experiences demonstrate sensitivity to and understanding of the diverse academic, socioeconomic, cultural, linguistic, racial, ethnic backgrounds and disabilities of community college students, faculty, and staff.
7. Draft, submit, assess, and revise, College documentation that includes, but is not limited to, Accreditation, Program Plans, Program Reviews, and Service Area Outcomes related to assigned areas of responsibility.
8. Demonstrate sensitivity to and understanding of the diverse academic, socio-economic, cultural, disability, and ethnic backgrounds of students.

**FUNCTIONAL RESPONSIBILITIES: *Job Level***

1. Plan, coordinate, supervise and evaluate the activities of the Financial Aid Office including but not limited to State and Federal programs, scholarships, and other student financial assistance programs. Ensure Financial Aid operations are integrated, compliant, and streamlined to provide excellent customer service, appropriate application systems, and necessary staffing.
2. Collaborate and work in partnership with the U.S. Department of Education, California Student Aid Commission, Foundation for California Community Colleges, and the California Community Colleges Chancellor's Office on student Financial Aid issues.
3. Interpret, apply, and enforce federal, state and institutional financial aid policies, procedures and regulations that pertain to eligibility determination, awarding and disbursement of financial aid. Manage the awarding and disbursement of multiple financial aid funds, including federal, state, and local allocations, and ensure accurate reconciliation and reporting.
4. Collaborate and work in partnership with the Foundation & Scholarship Office and other College entities to determine eligibility, award and disburse federal, state and local financial aid.
5. Collaborate and work in partnership with the Administrative Services Area to ensure financial aid reports are submitted accurately and on-time; compatibility with external software programs is maintained; debit cards are distributed to eligible students; drawdowns and Return of Title IV funds are successfully executed; and financial aid disbursements are made according to the established schedule.
6. Collaborate and work in partnership with the Office of Public Relations & Marketing to develop, maintain, and update informational and outreach materials and develop communication tracks in various communication mediums including hardcopy, online, and social media.
7. Advocate on behalf of the students and the College, to state and local leaders on issues related to Financial Aid awards and administration. Advise prospective and current students regarding financial aid; review professional judgment cases; and render appropriate decisions on financial aid related matters. Meet and communicate with

- students to address and respond to complaints and concerns regarding financial aid eligibility, awarding, and disbursement.
8. Plan, organize, manage, and direct the distribution, collection, review, and evaluation of student financial aid forms and applications; coordinate activities to ensure proper determination of student eligibility for financial aid programs. Serve as the primary liaison between the College and third-party vendors for the disbursement of financial aid.
  9. Oversee Basic Needs operations and initiatives to ensure compliance with state rules and guidelines.
  10. Participate in financial aid outreach activities and College sponsored functions on and off campus to educate prospective and current students about federal, state, and institutional financial aid opportunities. Participate in College assigned committees, work groups, and campus-wide initiatives that address enrollment management and help improve student retention, persistence, graduation, and transfer.
  11. Prepare for and participate in Financial Aid audits and investigations conducted by federal, state, and institutional entities and respond as appropriate.
  12. Respond to requests for information on a timely basis and advise students, faculty, staff, visitors, and other College departments regarding College Financial Aid policies and procedures.
  13. Provide leadership in the evaluation and improvement of processes within the Financial Aid Office to assure that all services provided to students are prompt, efficient and lead to a seamless experience for the student.
  14. Monitor changes in laws, regulations, and technology that may affect College or departmental operations; review College policies and procedures to ensure compliance; and implement policy and procedural changes as required. Oversee and participate in reviewing, processing, and training staff on State and Federal rules and regulations.
  15. Be an involved participant on the Enrollment Services management and leadership teams; collaborate with other managers within the area in the development of area plans and priorities.

### **III. RELATIONSHIPS**

1. Develop and enhance partnerships with schools, colleges, universities, businesses, and community-based organizations to respond to the educational, workforce training, and economic development needs of the community.
2. Advance an effective process of collaboration and collegial consultation conducted with integrity and respect to inform and strengthen decision-making.
3. Work closely with other departments within the Division and across the College to foster and facilitate a seamless student experience and increase student success.
4. Work cooperatively and communicate effectively with College administrators and staff, representatives of State and federal agencies, educational institutions, social service organizations, community representatives, and others to coordinate and implement assigned programs and activities and provide information to others.
5. Attend a variety of administrative and staff meetings related to strategic planning, budget, advisory committees, and other assigned activities; participate in consultation, shared

governance, and appropriate advisory committee meetings. Chair committees as assigned.

6. Maintain and encourage effective communication with assigned staff by holding regular staff meetings. Provide timely information to staff about issues, programs, and practices affecting the college, Division, and departments.
7. Network with professional colleagues inside and outside of the College. Attend workshops and professional conferences to stay informed of new developments and technologies; serve on a variety of campus, community, and state committees; meet with representatives of business, industry, and local government as appropriate.
8. Participate as an active member of the Division's management team.

#### **IV. ORGANIZATION MANAGEMENT**

1. Maintain up-to-date knowledge of the regulations, policies, requirements, and eligibility criteria for assigned programs and ensure compliance with the College's policies, procedures, and practices.
2. Strengthen processes, programs, and services through the effective and efficient use of assessment, program review, planning, and resource allocation. Implement priorities in conjunction with the College's comprehensive planning and budgeting guidelines. Implement an organizational structure that maximizes utilization of resources and ensures effective and efficient delivery of services.
3. Train, supervise, motivate, and evaluate the performance of assigned managerial, professional, operational, technical, and support personnel; recommend transfers, reassignment, termination, and disciplinary actions as needed; delegate and review assignments; evaluate work products and results, implement appropriate procedures to accommodate need for information and assistance; establish and monitor timelines and prioritize work. Monitor employee performance on a regular basis and provide coaching for performance improvement and/or development as needed. Anticipate, prevent, and resolve conflicts under areas of supervision.
4. Implement plans for efficient and appropriate use and security of assigned facilities; ensure compliance with health and safety regulations.
5. Work with Information Technology personnel on a continual basis to enhance and improve relevant computer systems. Learn and apply emerging technologies to perform duties and provide services in an efficient, organized, and timely manner. Work to modernize infrastructure and technological resources to facilitate a positive learning and working environment and promote student success.
6. Perform other duties as assigned.

#### **MINIMUM QUALIFICATIONS**

**Education:** Master's degree in Business Administration, Social Science, Education Administration, Finance, or a related field.

**Experience:** Eight (8) years of progressively responsible work experience in student financial aid, including at least three (3) years of supervisory or management experience.

## **LICENSES AND OTHER REQUIREMENTS**

Valid California driver's license.

(Note that for travel reimbursements, a valid California driver's license and successful completion of the District's Defensive Driver Training program is required.)

### **Knowledge/Areas of Expertise: College Level**

- California Education Code, Title 5, Chancellor's Office administrative procedures, Federal laws and regulations and other legal parameters that affect the policies and practices of the College, as they apply to areas assigned.
- Understanding of higher education principles and practices in community colleges, including the mission of the California Community Colleges.
- Community college organization, operations, policies, and objectives, including specific policies and procedures of El Camino College covering the departments or units supervised.
- Specific needs and interests of community college students.
- Principles of business administration, management, marketing, and record keeping.
- Effective organizational and management practices pertaining to the analysis and evaluation of projects, programs, policies, procedures, department performance metrics, and operational needs.
- Effective fiscal management strategies, including understanding of budget concepts, principles, and practices, and effective budget administration and control.
- Effective financial reporting and record keeping.
- Grant proposal writing and special funding resources applicable to areas supervised.
- Appropriate risk management strategies, safety precautions, and procedures.
- Principles of communicating and collaborating effectively with diverse students, faculty, staff, and administration.
- Effective methods for conflict resolution and crisis management.
- Effective change management principles and practices.
- Evaluation and statistical methodology for preparation of statistical research and reports.
- Effective marketing, promotion, and public relations techniques. Preparation, publication, and distribution of informational and promotional materials related to areas assigned.
- Effective written and oral communication skills. Effective interpersonal skills using tact, patience, and courtesy. Effective collaboration, communication, and consensus-building techniques.
- Effective needs assessment methods and project management practices. Effective data management, record-keeping, and reporting techniques. Understanding of key performance indicators, goals, and measurable objectives and how to implement them.
- Effective leadership, administration, organizational planning, supervision, training, and analysis techniques applied to the assigned administrative area. Comprehensive understanding of the principles and practices of effective supervision, training, motivation, and performance evaluation.
- Computer systems and software applications related to areas of assignment, including capabilities and limitations. Modern office practices, procedures, and equipment. Operation of computer, peripherals, and software programs, including information systems, database management, spreadsheet, word processing and specialized software.
- Proficient level operation of a computer and assigned software, including proficient level use of common office software such as: Excel, Access, Word, Outlook, and PowerPoint.

- Technological advancements and their application to the assigned areas of responsibility.

**Knowledge/Areas of Expertise: Job Level**

- Proficient knowledge of federal, state, and institutional regulations governing financial aid, including grants, scholarships, work study and loan programs.
- Extensive knowledge of effective and legally compliant Financial Aid accounting principles and practices.
- Extensive knowledge of electronic data processing and records management systems, including but not limited to computer hardware and software required to determine eligibility, award, and disburse financial aid.

**Abilities/Skills: College Level**

- Represent the College in a manner that reflects a positive image of services and support provided.
- Demonstrate sensitivity to and an understanding of the diverse academic, socioeconomic, cultural, linguistic, disability, and ethnic backgrounds of community college students, faculty, and staff. Relate effectively to people of varied academic, cultural, and socio-economic backgrounds using tact, diplomacy, and courtesy.
- Establish and maintain cooperative and effective working relationships with a wide diversity of students, faculty, staff, and community members in an atmosphere of collegial decision-making and consensus-building. Work effectively and collaboratively in a diverse college environment, as well as within a community college system.
- Establish and maintain cooperative and effective working relationships with others. Listen effectively. Communicate respectfully with people of diverse cultures, languages, abilities, etc. Work effectively with others to build consensus and gain cooperation through discussion and persuasion to achieve common goals.
- Provide effective customer service and end-user satisfaction. Respond promptly to requests and inquiries from the public. Effectively resolve complex problems.
- Work independently with limited administrative oversight and direction. Adhere to ethical principles and practices, consistently exercise good judgment, and make effective decisions. Demonstrate flexibility and creativity in accomplishing work and resolving problems.
- Meet assigned schedules and timelines. Effectively manage the stress of working under tight timelines.
- Maintain confidentiality and act with discretion. Maintain the security of confidential materials.
- Travel to meetings and events on and off campus as required. Observe legal and defensive driving practices when operating a motor vehicle on campus or on official business.
- Utilize effective planning and organizational skills. Analyze problems, identify alternative solutions, anticipate consequences of proposed actions, and implement effective solutions in support of goals.
- Administer and control the budget for program areas as assigned.
- Chair and participate in a variety of college committees and work groups as directed.
- Read, understand, interpret, and apply technical and legal information effectively. Analyze, interpret, communicate, and enforce applicable federal, state, and local laws,

regulations, rules, policies, administrative data, and related materials. Interpret, apply, and explain rules, regulations, policies, and procedures in a variety of procedural situations for areas assigned.

- Collect, compile, and analyze data. Prepare comprehensive narrative and statistical reports. Direct the maintenance of a variety of reports and files related to assigned activities. Prepare and maintain accurate and detailed records and reports related to the area supervised. Prepare analytical reports, proposals and other written plans for the College, Board of Trustees, Chancellor's Office, and other outside agencies as assigned. Assist in related research and evaluation activities as required.
- Utilize effective oral and written communication skills, including business letter writing, report preparation, and public speaking. Utilize appropriate English usage, composition, grammar, spelling, punctuation, and vocabulary.
- Communicate clearly, concisely, and effectively with diverse constituencies within and outside of the College, both orally and in writing. Prepare and present effective oral and written reports, press releases, and promotional materials as required. Prepare and deliver effective presentations as requested.
- Utilize effective planning and organizational skills. Plan, organize, coordinate, and direct work to maximize efficiency and effectiveness. Prepare work plans, implement schedules, and consistently meet reporting timelines. Effectively delegate authority and responsibility. Provide guidance and assistance to the functional and operational areas within the assigned Department.
- Utilize effective leadership, counseling, and modeling skills. Encourage professional excellence among employees and promote an organizational culture of customer service, teamwork, and innovation.
- Effectively train, direct, supervise, motivate, and evaluate the performance of assigned staff. Facilitate effective staff meetings, group discussions, and involve staff in idea generation, goal setting, and decision making.
- Work effectively within a unionized environment.
- Operate a variety of office equipment including a computer. Use automated systems to maintain records, collect data, and generate reports.

**Abilities/Skills: Job Level**

- Work independently on complex financial aid issues and processes to ensure effective outcomes.

**WORK ENVIRONMENT AND PHYSICAL DEMANDS**

*The work environment and physical demands described here are representative of those required by an employee to perform the essential functions of this job successfully.*

***Note: Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.***

**Work Environment**

Standard office setting. Duties are performed primarily in an office environment while sitting at a desk or computer workstation. Incumbents are subject to extensive contact with students, faculty, and staff with frequent interruptions, noise, and demanding timelines. At least minimal



environmental controls to assure health and comfort. Frequently involves working non-standard, evening, and weekend hours.

**Physical Demands**

Incumbents regularly sit or stand for long periods, travel short distances on campus on a regular basis, travel to various locations to attend meetings and conduct work, use hands and fingers to operate an electronic keyboard or other office machines, reach with hands and arms, speak clearly and distinctly to answer telephones and to provide information; see to read fine print and operate computer; hear and understand voices over telephone and in person; and lift, carry, and/or move objects weighing up to 25 pounds.

*\* Previous employment performed in a different public retirement system may allow eligibility to continue in the same retirement system.*