

**CLASS SPECIFICATION**  
**Deputy Director, Financial Aid**

FLSA Status: Exempt  
EEOC Job Category: Officials and Administrators  
Union Representation: Unrepresented

**GENERAL PURPOSE**

Under policy direction, plans, directs, manages, evaluates and oversees the activities and staff of an assigned Financial Aid Office; examines, analyzes and makes recommendations regarding financial aid administration and develops administrative procedures for the day-to-day operations of an assigned Office; plans and schedules the disbursement of financial aid funds to students; resolves the more complex and difficult financial aid processing and student account issues; and performs related duties as assigned.

**DISTINGUISHING CHARACTERISTICS**

Deputy Directors, Financial Aid are responsible for directing, managing, reviewing and supervising the activities and staff of an assigned Financial Aid Office. Incumbents assist Office staff in the intake of financial aid applications and supporting documentation and the day-to-day management of financial programs and services. Incumbents are responsible for resolving the more complex and difficult financial aid processing and student account issues and working with governmental and private student aid funding agencies to resolve student account issues. Incumbents are also responsible for developing and maintaining record keeping systems and procedures in accordance with federal and state regulations. Assignments are broad in scope and allow for a high degree of administrative discretion in their execution.

**ESSENTIAL DUTIES AND 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. Plans, organizes, controls, manages and evaluates the work of an assigned Financial Aid Office; with subordinate staff, participates in establishing operational plans and initiatives to meet Office goals and objectives; implements Office plans, work programs, processes, procedures and policies required to achieve overall Office performance results; coordinates and integrates Office functions and responsibilities to achieve optimal efficiency and effectiveness; participates in developing and monitoring performance against the annual Office budget.
2. Plans and evaluates the performance of assigned staff; establishes performance requirements and personal development targets; monitors performance and provides coaching for performance improvement and development; provides or recommends compensation and other rewards to recognize performance; takes disciplinary action, up to and including termination, to address

performance deficiencies, subject to management concurrence, in accordance with the District's classified human resources policies and procedures and labor contract provisions.

3. Provides day-to-day leadership and works with staff to ensure a high performance, customer service-oriented work environment which supports achieving District objectives and service expectations; provides leadership and participates in programs and activities that promote a positive employee relations environment.
4. Plans, directs, manages, evaluates and oversees the activities and staff of an assigned Financial Aid Office; examines, analyzes and makes recommendation regarding financial aid administration and develops administrative procedures for the day-to-day operations of an assigned Office; assists in the preparation of portions of the financial aid operating budget and student expense budgets; plans and schedules the disbursement of financial aid funds to students; ensures the achievement of special projects and ensures compliance with related regulations.
5. Resolves the more complex and difficult financial aid processing and student account issues; corresponds with governmental and private student aid funding agencies on behalf of students to resolve student account issues; confers with students and verifies and reviews student financial aid files in accordance with federal regulations; exercises professional judgment as described in federal regulations governing Title IV programs; assists financial aid staff in the intake of financial aid applications and supporting documentation and the day-to-day management of financial programs and services.
6. Serves on the District's Financial Aid Appeals Committee; monitors student loan defaults and academic progress; evaluates informal and formal student appeals regarding ineligibility for financial aid and determines appropriate course of action as appropriate; assists financial aid counselors in the organization, preparation and processing of student files for verification and appeal reviews.
7. Devises and maintains record keeping systems and procedures in accordance with federal and state regulations; prepares a variety of complex, periodic and special reports and surveys; coordinates special projects as assigned by the Director of Financial Aid.
8. Organizes and participates in outreach programs for local schools and community agencies.

#### **OTHER DUTIES**

1. Represents the District at various meetings, workshops and conferences.

#### **QUALIFICATIONS**

##### **Knowledge of:**

1. Principles and practices of generally accepted accounting and auditing procedures related to Federal Title IV financial aid.
2. Applicable sections of the State Education Code and the Federal Title IV regulations.
3. Other federal, state and local laws, regulations and court decisions applicable to assigned areas of responsibility.

4. Features, requirements and eligibility provisions of federal, state and local financial aid programs.
5. Policies, objectives and technical aspects of financial aid programs and activities.
6. Methods and techniques of conducting financial aid needs analyses.
7. Methods and procedures of financial aid award packaging.
8. District organization, operations, policies and objectives pertaining to student admissions and financial aid.
9. Principles and techniques of student interviewing and counseling.
10. Principles and practices of public administration, including budgeting, purchasing, contract administration and maintenance of public records.
11. Financial and statistical recordkeeping techniques.
12. Research methods and analysis techniques.
13. Principles and practices of sound business communication.
14. Principles and practices of effective management and supervision.
15. District classified human resources policies and procedures and labor contract provisions.

**Ability to:**

1. Plan, direct, manage, coordinate and integrate the work of an assigned Financial Aid Office providing student financial aid processing functions.
2. Define complex management, fiscal and budget issues, perform difficult analyses and research, evaluate alternatives and develop sound conclusions and recommendations.
3. Interpret rules, regulations and policies regarding financial aid programs and awards and determine student eligibility.
4. Perform financial and statistical recordkeeping duties for a variety of federal and state financial aid programs.
5. Relate effectively to students with economically deprived backgrounds.
6. Present proposals and recommendations clearly, logically and persuasively in public meetings.
7. Prepare clear, concise and comprehensive correspondence, reports, studies and other written materials.
8. Exercise sound, expert independent judgment within general policy guidelines.
9. Maintain confidentiality of District files and records.
10. Exercise tact and diplomacy in dealing with sensitive and complex issues and situations.

11. Establish and maintain effective working relationships with District administration, staff, students, representatives of governmental and private student aid funding agencies, the public and others encountered in the course of work.

**Education, Training and Experience:**

A typical way of obtaining the knowledge, skills and abilities outlined above is graduation from a four-year college or university with a degree in psychology, sociology, business administration or a related field; and at least seven years of progressively responsible student financial aid processing experience, at least three of which were in a supervisory or lead capacity; or an equivalent combination of training and experience.

**Licenses; Certificates; Special Requirements:**

A valid California driver's license and the ability to maintain insurability under the District's vehicle insurance policy.

**PHYSICAL AND MENTAL DEMANDS**

The physical and mental demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Physical Demands**

While performing the duties of this job, the employee is regularly required to sit; talk or hear, both in person and by telephone; use hands to finger, handle and feel computers and standard business equipment; and reach with hands and arms. The employee is frequently required to stand and walk.

Specific vision abilities required by this job include close vision and the ability to adjust focus.

**Mental Demands**

While performing the duties of this class, the incumbent is regularly required to use written and oral communication skills; read and interpret complex data, information and documents; analyze and solve complex problems; use math/mathematical reasoning; observe and interpret people and situations; perform highly detailed work under intensive deadlines, on multiple concurrent tasks; work with constant interruptions, and interact with District administration, staff, students, representatives of governmental and private student aid funding agencies, the public and others encountered in the course of work.

**WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The employee works under typical office conditions, and the noise level is usually quiet.