

**San Jose · Evergreen Community College District  
Classified Job Description**

**Position:** Financial Aid Coordinator

**Department:** Financial Aid

**Location:** Evergreen Valley or San Jose City College

**Date:** May 13, 2020

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**POSITION PURPOSE**

Under the direction of Financial Aid administrator, serve as the lead classified employee in the Financial Aid Office; respond to problems, concerns and activities associated with students, staff and department employees. Work with assigned administrator to assign and review the work of staff, responsible for the technical and operational services in the Financial Aid Office; monitor and participate in the work of the office.

**DISTINGUISHING CHARACTERISTICS**

The Coordinator is the fourth and senior-level in a Financial Aid career path. This classification differs from Financial Aid Specialist III in the significantly higher level of responsibility and direction expected to be provided. The Financial Aid Coordinator will be expected to lead the office under general direction and with minimal supervision from the Financial Aid administrator. The Coordinator is expected to make decisions on a higher-level line of authority, utilizing independent judgment and initiative.

**KEY DUTIES AND RESPONSIBILITIES:**

1. Assist in planning, organizing and coordinating the day-to-day operations with financial aid staff to ensure efficient delivery of services to students and the college community.
2. Provide detailed information to students, parents, faculty and staff regarding financial aid processes, types of aid, etc.
3. Determine and monitor student eligibility for Federal, State and campus-based aid programs, including Satisfactory Academic Progress calculations and appeals.
4. Reconcile financial aid program funds internally and with college and District Fiscal Services on a regular basis.
5. Coordinate with District ITSS to provide technical solutions regarding the campus/district financial aid systems and assist as needed in the day-to-day usage; test and practice patches and updates in collaboration with ITSS.
6. Participate in the hiring of hourly or student employees. Coordinate and lead employee training. Assist with implementation of new procedures.
7. Conduct financial aid workshops and orientations including but not limited to: Student Loan Orientation, Federal Work Study Orientation and Satisfactory Academic Progress Workshops.
8. Participate in student imitative programs in collaboration with various program partners.
9. Explain and interpret District policies and procedures. Recommend and assist in the implementation of goals, objectives, policies and procedures.
10. Interpret, implement, and maintain up-to-date knowledge of Federal and State guidelines governing financial aid programs. Prepare, implement, and revise policies and procedures, as necessary, to comply with changes in State and federal laws.
11. Provide support to Financial Aid Office using Federal and State agency online data management systems to troubleshoot student and college record management issues.

12. Work with assigned administrator to collect, analyze and take action based on Financial Aid student data. Prepare reports on operations and activities as assigned.
13. Conduct assessment of student needs including monitoring and evaluating the efficiency and effectiveness of service delivery methods and procedures. Evaluate office procedures related to student service and make recommendations to assigned administrator accordingly.
14. Perform other duties reasonably related to the job classification.

## **EMPLOYMENT STANDARDS**

### **Knowledge of:**

1. Federal, State and local student financial aid programs regulations and guidelines.
2. Financial barriers for low-income students/families.
3. Federal and State financial aid applications and associated information.
4. Federal and State electronic communications and reporting requirements.
5. Common office productivity software and financial aid specific software.
6. General policies and procedures for a financial aid Office.
7. Public speaking principles and techniques.
8. Research methods and techniques.
9. Statistical analysis methods.
10. Record-keeping techniques.
11. Basic accounting practices procedures and terminology.
12. Principles and practices of administration, supervision and training.
13. Correct English usage, grammar, spelling, punctuation and vocabulary.
14. Oral and written communication skills.

### **Skills and Ability to:**

1. Understand and follow oral and written instructions.
2. Interpret, apply and explain policies, procedures and regulations regarding financial aid programs.
3. Exercise sound judgment in reviewing and screening applications for financial aid when determining eligibility and evaluating special circumstances.
4. Operate office machines including a computer and applicable software.
5. Analyze situations accurately and adopt an effective course of action.
6. Perform business math computations and maintain accurate financial records.

7. Prepare and deliver oral presentations and a variety of correspondence.
8. Read, interpret and explain statistical data, technical procedures and governmental regulations.
9. Research, analyze and evaluate service delivery methods and techniques.
10. Train and provide direction to personnel.
11. Assign and review the work of others.
12. Communicate effectively both orally and in writing.
13. Establish and maintain cooperative and effective working relationships with and effectively serve students.

**Experience and Education:**

1. Associate's degree from an accredited institution.
2. Four years of increasingly responsible experience in a related position including at least 3 years of experience working directly in the administration of Financial Aid.
3. Demonstrated sensitivity, knowledge, and understanding of the diverse academic, socioeconomic, gender identity, sexual orientation, cultural, disability, and ethnic backgrounds of the individuals we serve and sensitivity to and knowledge and understanding of groups historically underrepresented, and groups who may have experienced discrimination.

**WORKING CONDITIONS**

**Environment:**

1. Typical office environment.

**Physical Demands:**

1. Require sufficient ambulatory ability to move to various work locations. Require manual hand-eye-arm coordination to use a personal computer keyboard and visual media equipment. Require sufficient hearing and auditory ability to carry on conversations in one-on-one and small group settings and deliver in-service type training and presentations. Require near visual acuity to read printed materials.

Board Approved: 6/8/04, 6/10/14, 5/12/20

Modified: 6/3/14 (education requirement); 12/12/19 (duties and education)

Salary Range: 96

EEO Category: 2B3 – Technical/Paraprofessional