

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

Position: Financial Aid Outreach Specialist

Department: Financial Aid

Location: Evergreen Valley or San Jose City College

Date: 7/1/15

POSITION PURPOSE

Under the direction of an assigned administrator, the Financial Aid Outreach Specialist performs general financial aid office activities and specialized outreach duties related to increasing and promoting awareness and participation of financial aid program amongst potentially eligible students. This position works with supervisor to develop and provide financial aid information to students, parents, staff and the general public; maintains records and assists in determining financial aid eligibility according to federal and state regulations and requirements.

KEY DUTIES AND RESPONSIBILITIES:

1. Participate in the development, planning and implementation of financial aid outreach policies and strategies aimed at increasing student success to financial aid programs and services.
2. Perform financial aid outreach and follow-up activities to targeted populations; present financial aid information to students, parents, staff and the general public in a variety of settings, such as high schools, on-campus, businesses and community organizations.
3. Develop and organize outreach materials and/or events targeted towards increasing awareness in financial aid programs and services.
4. Collaborate with other college departments to implement college-wide financial aid outreach efforts.
5. Provide information and technical assistance to students regarding eligibility, regulations and requirements of various federal, state and district financial programs such as grants, loans, work-study, fee waivers, scholarships, and contingency funds.
6. Instruct students in correct procedures for completion of paper or online forms and applications; review forms for accuracy and consistency.
7. Assist students with financial aid application. Explain eligibility and other factors necessary for successfully completing financial aid process. Assist in determination of acceptability when situations are unusual.
8. Review applications and required documentation to determine financial need and program eligibility for a variety of Federal, State and District programs.
9. Verify eligibility for and accept awards, and initiate disbursements in a variety of programs according to established guidelines and procedures.
10. Perform needs analysis and assist in packaging students for financial aid programs, enter and update data in system.
11. Monitor continued eligibility of students in financial aid programs, evaluate and monitor Satisfactory Academic Progress.

12. Maintain records and prepare reports according to established guidelines and procedures needed to meet retention requirements.
13. Schedule and conduct group and/or individual financial aid workshops or presentations suitable for diverse audiences.
14. Prepare and maintain database of prospective contacts, financial aid recipient information, and outreach activities.
15. Communicate and respond to inquiries from internal and external agencies or individuals. Provide assistance, information and training to faculty, other campus staff and the public as requested.
16. Attend training sessions and workshops to remain current on financial aid regulations and procedures.
17. Assist in reconciliation of disbursement records and compilation of data and statistics for reporting purpose.
18. Perform other related duties as assigned.

Knowledge of:

1. Pertinent federal, state and district rules, regulations and policies of financial aid programs.
2. Basic operations, services and activities of financial aid outreach programs.
3. Methods and practices of financial aid record keeping.
4. Principals and techniques of presentation in an environment with diverse audience
5. Recent developments, current literature and information related to financial aid programs.
6. Needs or special concerns of high school and adult students enrolling at community colleges.
7. Modern office practices, procedures and equipment including computer operation.
8. Oral and written communication skills.

Skills and Ability to:

1. Perform specialized outreach duties to promote financial aid programs and services.
2. Use applicable software or other media to enhance presentation; make oral presentations before large and small groups.
3. Interpret and apply laws, rules and policies of the financial aid program.
4. Interpret financial statements, income tax reports and related documents.
5. Exercise sound judgement in reviewing and evaluating student financial aid applications.
6. Maintain accurate records and prepare reports, summaries and evaluations.
7. Maintain confidentiality of sensitive information.
8. Develop and update forms and marketing materials.

9. Communicate effectively both orally and in writing.
10. Establish and maintain cooperative and effective working relationships with others.
11. Work independently with little supervision; prioritize work and meet schedules.

Experience and Education:

1. An Associate degree or equivalent supplemented by college course work in business, accounting, social services or related field.
2. Four years of increasingly responsible experience that includes direct work in outreach and financial aid areas.

WORKING CONDITIONS

Environment:

1. Typical office environment.

Physical Demands:

1. Dexterity of hands and fingers to operate a computer keyboard.
2. Sitting or standing for extended periods of time.
3. Hearing and speaking to exchange information in person or on the telephone.
4. Seeing to read a variety of materials.

Board Approved: 6/9/15

Salary Range: 89

EEO Category: 2B3 – Technical/Paraprofessional