

**JOB TITLE:** Financial Aid Program Manager

**PAY GRADE:** CS18

**LAST REVISED:** APRIL 2023

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job. Additional or different duties from the ones set forth below may be required to address changing business needs/practices.*

### **SUMMARY DESCRIPTION**

Sierra College has committed to foundationally re-engineer its programs and services using Guided Pathways to increase student achievement, ensure student equity, and effect timely goal completion. Under the administrative direction of the Director of Enrollment Services - Financial Aid or assigned administrator, this position serves as a member of the District's management team to provide leadership in matters relating to the administration of assigned programs within Student Services, and to perform related work as required.

Sierra College is committed to Guided Pathways to increase student achievement and timely goal completion and to close equity gaps. In that spirit, the Financial Aid Program Manager performs a full range of complex administrative, programmatic, and technical duties in support of all aspects of the Financial Aid Department and its collaboration other units within the Sierra Joint Community College District. The Program Manager is responsible to ensure areas of oversight afford an inclusive educational and employment environment and focused on equitable outcomes for all. Under the administrative direction of the Director of Enrollment Services, Student Financial Aid, this position provides leadership for providing financial aid services that increase student enrollment, retention, persistence, and completion.

Sierra College has a strong commitment to the achievement of equity and inclusion among its faculty, staff, and students, and values the rich diverse backgrounds that make up the campus community. The Financial Aid Program Manager must demonstrate a profound understanding of and experience with successfully supporting individuals with varying and diverse backgrounds, including persons with disabilities, various gender identities and sexual orientations, individuals from historically underrepresented communities, and other groups. The Financial Aid Program Manager will effectively ensure the District develops and provides strategies for student success, as well as proactive, student-centered practices and policies committed to eliminating equity gaps.

### **DISTINGUISHING CHARACTERISTICS**

The Program Manager assists the Financial Aid Director with program and customer service operations for the financial aid office, including front desk operations, supervising, and training professional staff and student employees, and ensuring an intentional, proactive culture of equitable and accessible financial aid services across the District. The Program Manager assists in the development of effective financial aid services to support students and parents throughout the financial aid application process and through the student's successful completion of their educational goals. The supervisor will assist the Director in the management of all federal and state programs, including reporting, communication, and budget management. The Financial Aid Program Manager will support the Department by ensuring policy and procedure compliance with state and federal regulations. The Program Manager will provide programmatic support and collaboration in the continued development and delivery of key student supports, including with the following populations and programs: Basic Needs, student employment, crisis intervention, special programs, foster youth, justice and immigration-impacted students, and other areas as assigned. The Program Manager will be a key liaison and interlocutor with Interest

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Area and equity related student support networks, ensuring timely and responsive communication, collaboration, and teamwork to proactively resolve financial aid issues affecting case management, student equity, and success.

**REPRESENTATIVE DUTIES** - *The following duties are typical for this classification. 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.*

1. Ensures policy and procedure compliance with state and federal regulations by:
  - a. Collaborating with the Director and other financial aid staff to review, update, and maintain all financial aid procedures and policies in compliance with state and federal regulations;
  - b. Collaborate with financial aid staff to maintain and update the Financial Aid portions of the website - especially Consumer Information Disclosures as required by the Department of Education.
2. Supports student recruitment, retention, equity, and success by:
  - a. Collaborating with student services staff and other departments across the District to provide quality customer service and communications to students, families, and colleagues;
  - b. Providing timely and accessible financial aid information and education to prospective and current students, families, and colleagues;
  - c. Ensuring a operational culture of proactive, equitable access to financial aid services;
  - d. Effectively communicating the data, efforts, and processes of Financial Aid services with student services areas;
  - e. Supporting and facilitating the caseload management needs, structure, and operations of Sierra Supports, Guided Pathways, Interest Areas, equity related student support efforts, Basic Needs, special programs, justice and immigration-impacted students, and other defined pathways, especially in terms of financial aid services and practices;
  - f. Attending and presenting at special events and programs.
3. Supports special projects and provides leadership in areas assigned by the Director, which includes the management of a specific function vital to the administration of financial aid or collaboration with other Sierra College areas; including, but not limited to, managing state and federal grant programs, serving as the principal liaison to key campus units and programs, and/or managing elements of the student employment continuum both on and off campus.
4. Collaborates with department members and Student Services areas to give educational presentations to prospective students and families at evening and weekend events as needed.
5. Ensures the effective operation of the financial aid office by utilizing expertise in systems management and providing operational oversight for a highly automated financial aid management system.
6. Ensures effective operation of the area of responsibility within the Student Financial Aid Office by developing and recommending student financial aid policy, managing aid funds, conducting program evaluation, adapting the financial aid management system to maximize efficiency, working collaboratively with colleagues, and performing duties as assigned by the Director.
7. In collaboration with the Director of Financial Aid, regularly reviews and makes recommendations regarding student financial aid communication and related processes to support equity, success, and maximizing aid across the district.
8. Assists and collaborates with the Basic Needs Manager with maximizing financial aid for students.
9. Serves as the financial aid liaison and provides responsive, proactive support for equity related student support networks and Interest Area case management teams, as well as other assigned pathway and services areas, in order to ensure students are maximizing financial aid in a timely manner throughout their

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10. student journey; serves as the Financial Aid liaison to Outreach, Success Center and Sierra College Foundation.
11. Prevents institutional liability and ensures College compliance with federal and state regulations governing financial aid by maintaining current knowledge on same and by revising the College's Policy and Procedure Manual of Financial Aid.
12. Ensures the maximum utilization of aid funds through efficient processing in the area of responsibility; provides data, reports, and communications regarding processing and maximizing aid as needed.
13. In collaboration with the Director of Financial Aid, provides administrative oversight, leadership, and management for Financial Aid services the District, including its main campus and centers.
14. In collaboration with the Director of Financial Aid, assists in the development and execution of financial aid policy, processes, and operations for Placer One.
15. Contributes to an inclusive and equity-focused work environment that encourages knowledge of, respect for, and development of skills to engage with students and employees varying and diverse backgrounds, including persons with disabilities, various gender identities and sexual orientations, individuals from historically underrepresented communities, and other groups.
16. Ensures that timelines are met for District, state, and federal requirements relating to the duties of the Financial Aid Office.
17. Supports the District enrollment services and management plan by coordinating the area of responsibility in a manner consistent with the District strategic goals and vision.
18. Participates in the development and review of goals, objectives, policies and procedures, especially with an emphasis on supporting diversity, equity, inclusion, and accessibility across the District; makes recommendations for changes and improvements to existing standards, policies, and procedures; monitors staff work activities to ensure compliance with established policies and procedures.
19. Coordinates and performs a variety of funds management and reconciliation duties; ensures that proper procedures, policies, rules, and regulations are applied to all federal/state programs; analyzes and calculates financial aid funding needed from various federal and state programs; monitors federal and state accounts to ensure that financial aid monies are accurately drawn and deposited into correct District accounts; coordinates with internal and external auditors to guarantee program fund accountability and integrity; completes federal payment documents; oversees and verifies federal and state grant and loan accounts; monitors federal authorization of funding; monitors status of program fund account ledgers with District's Business Services staff and County Office of Education accounting systems; monitors repayments; balances fund accounts; and reconciles assigned accounts.
20. Performs a variety of research and reporting duties; gathers, interprets, and analyzes a variety of data; completes and prepares a variety of records and reports related to financial aid services; develops and creates reconciled data files for information to be transmitted to other agencies; gathers data and information to complete surveys and reports including those for other agencies and institutions.
21. Participates in the development and design of financial aid software reporting tools; establishes and maintains financial aid processing rules within the software; modifies and inputs data elements to comply with regulatory changes; coordinates with representatives from state and federal agencies to troubleshoot problems with specialized software and data base integrity; designs reports to provide information to applicable agencies.
22. Performs a variety of customer service and marketing duties; serves as point of contact with students regarding office services; represents the District at activities with local area high schools and other external agencies/organizations; interacts with other District organizational units to provide students with a comprehensive financial aid package; conducts financial aid workshops; explains programs to students and assist them with completing applications; coordinates award activities with internal and external contacts.

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23. Performs a full range of clerical and administrative duties in support of program operations and to research and resolve problems; assembles files and duplicates materials; composes and prepares office correspondence, materials, reports, forms, brochures, presentations, handbooks, manuals, and consumer information; answers phones, refers callers, and takes messages; maintains and orders supplies.
24. Maintains current knowledge and learn new state and federal laws, rules, and regulations pertaining to financial aid; reviews updated or new technical instructions or references; attends seminars, conferences, workshops, and other training sessions; participates in the development of new/revised procedures to accommodate changes; assists in providing training and direction to others regarding changes and new regulations including to create and disseminate new instructions.
25. Trains and provides work direction to assigned staff and student workers and temporary help as assigned.
26. Performs related duties as required.

**QUALIFICATIONS** - *The following generally describes the knowledge and ability required to enter the job and/or be learned within a short period of time in order to successfully perform the assigned duties.*

### **Knowledge of:**

- In-depth knowledge of state and federal student financial aid processes and procedures including federal and state laws and regulations regarding the various duties of the Financial Aid Office.
- Guided Pathways and related practices.
- Role of higher education, and specifically community colleges, in supporting marginalized populations.
- Equity frameworks and practices in higher education.
- Current higher education equity-based retention and success trends, including issues, strategies, regulations, and compliance in the state, regionally, nationally, and internationally.
- Human relations skills, methods, and techniques to conduct interviews, convey technical information, resolve conflicts, and to facilitate problem resolution.
- General accounting and bookkeeping practices and techniques used in ledger recordkeeping. State and federal tax returns, schedules, and attachments.
- Needs analysis methodology.
- Methods to successfully support students with disabilities.
- Office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, and databases.
- Financial aid management systems and a variety of specialized off-campus software applications.
- Mathematical principles and practices.
- English usage, spelling, grammar and punctuation.
- Principles and procedures of record keeping and filing.
- Principles of business letter writing and basic report preparation.
- Pertinent federal, state, and local laws, codes, and regulations including state and federal labor law as it applies to the employment of students and DHS employment requirements and documentation.
- Management and leadership concepts and practices, including change management, organizational and motivational techniques;
- Personnel management practices and techniques of supervision and staff evaluation;
- Employment processes, collective bargaining processes, data collection, and report writing; and Safety practices.

### **Ability to:**

- Provides a full range of specialized support to District's financial aid programs and functions. Function as a technical expert in assigned areas of financial aid processing. Learn and understand in-depth student financial aid processes and procedures including laws, regulations, and District policies and procedures.

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- Apply an equity-minded framework and ensure programs, services and processes are designed and delivered to meet the varying needs of all eligible students.
- Coordinate operations and activities of the Basic Needs Program; implement procedures for the day-to-day operations of assigned program areas on as as needed basis.
- Perform arithmetic calculations of average to above average difficulty.
- Make oral presentations to groups.
- Operate office equipment including computers and supporting word processing, spreadsheet, and database applications.
- Adapt to changing technologies and learn functionality of new equipment and systems.
- Type or enter data at a speed necessary for successful job performance.
- Maintain close attention to detail.
- Properly handle difficult, sensitive, and confidential situations and materials.
- Plan, organize and prioritize work in order to meet schedules and timelines.
- Maintain current, accurate and confidential records and files including financial records.
- Conduct technical research and prepare a variety of comprehensive and statistical reports.
- Independently prepare routine correspondence and memoranda.
- Work independently and collaboratively.
- Supervise student and/or other temporary help.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.

**Education and Experience Guidelines** - *Any combination of education and experience that would likely provide the required knowledge and abilities is qualifying. Examples of ways to obtain the knowledge and abilities would be:*

**Education/Training:**

Bachelor's degree from an accredited college or university with major course work in business administration, accounting, or a related field.

**Experience:**

Five years of increasingly responsible supervisory and program support experience in a financial aid office.

**License or Certificate:**

Ability to obtain specialized certifications as required.

**PHYSICAL DEMANDS AND WORKING ENVIRONMENT** - *The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.*

**Environment:** Work is performed primarily in a standard office setting.

**Physical:** Primary functions require sufficient physical ability and mobility to work in an office setting; to stand or sit for prolonged periods of time; to occasionally walk, stoop, bend, kneel, crouch, reach, and twist; to lift, carry, push, and/or pull light to moderate amounts of weight; to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard; and to verbally communicate to exchange information.

**Vision:** See in the normal visual range with or without correction; vision sufficient to read computer screens and printed documents; and to operate assigned equipment.

**Hearing:** Hear in the normal audio range with or without correction.