

NON-INSTRUCTIONAL POSITION REQUEST 2016-2017

Internal Use

#: 2016-17

Range 32

Requester Name: Andi Schreibman

SECTION 1: SUMMARY INFORMATION

Title of Position Being Requested:

Financial Aid Advisor I (front desk)

Indicate if this position or a similar position has been presented to RAC previously and in what years:

n/a

Position Will Reside in Division/Unit:

Student Services/Financial Aid Office

A Current or Proposed District Job Description is attached:

Yes

No

The position is:

New

Number of Hours per Week: 40

Number of Months per Year: 12

Increase for an existing funded position

From: 9 10 11 Months

To: 10 11 12 Months

OR From: % to %

New Categorically funded position (information only; position not ranked)

Number of Hours per Week:

Number of Months per Year:

SECTION 2: JUSTIFICATION

Position Description/Function:

Primarily assigned to the Fin.Aid front desk. Responsible to assist and advise students of general and specific program information for federal and state financial aid programs, discuss eligibility criteria, interpret and explain financial aid policies and procedures; intake required forms and verify for correctness, provide appropriate reading materials, references, forms and applications; well trained in federal financial aid programmatic guidelines, regulations and procedures, responsible to train and supervise student assistants, perform scanning and indexing of confidential files, maintain student filing system, help resolve student issues and problems with respect to financial aid, BankMobile refunds, refer students to other support services or programs as appropriate. Review and process student financial aid files for payment, and responsible for other duties normally assigned to a Financial Aid Advisor I.

Indicate To Whom Does this Position Reports:

Financial Aid Officer (Andi Schreibman)

List other Personnel in the Unit:

Daysi Valle, Financial Aid Advisor III
 Ann Jones, Financial Aid Advisor II
 Lydia Penaflor, Financial Aid Advisor II
 Amy Rel, Financial Aid Advisor II

Give historical perspective of the changing workload over a 3-5 year period:

Example:

<i>Workload unit 1 = # Bio/Chem lab students/semester</i>	>	<u>2010</u>	=	<u>900</u>
		<u>2015</u>	=	<u>1000</u>
<i>Change over time is:</i>			=	<u>11%</u>

Workload unit 1 = _____	>	_____	=	_____
		_____	=	_____
Change over time is:			=	<u>0.00%</u>

Workload unit 1 = _____	>	_____	=	_____
		_____	=	_____
Change over time is:			=	<u>0.00%</u>

Comments:

Previously full-time staff have taken turns staffing our front desk, but due to understaffing and workload, this caused serious bottlenecks in our ability to processing files for timely student aid payments, since Staff cannot advise students and concentrate meticulously to review files simulataneously. For the past 9 months we have utilized equity funds to pay for two 25-hour/week on-call hourly staff to meet this immediate need. However, while they address the need, they cannot provide the level of expertise and full service we expect to provide our students. These staff arrive with no experience and can only provide general information; full-time staff are fully training in all aspects of financial aid, and provide a far better and more appropriate level of service. We cannot rely on these temporary funds to continue indefinitely, and we have already experienced turnover of these hourly staff which means additional hiring and training and continued lack of expertise in the services and advice we provide to our students.

SECTION 3: LPC MISSION, MASTER PLAN, AND ACCREDITATION

LPC MISSION STATEMENT:

LPC is an inclusive learning-centered institution providing educational opportunities and support for completion of students' transfer, degree, basic skills, career-technical, and retraining goals.

LPC PLANNING PRIORITIES:

- ❖ Establish regular and ongoing processes to implement best practices to meet ACCJC standards.
- ❖ Provide necessary institutional support for curriculum development and maintenance.
- ❖ Develop processes to facilitate ongoing meaningful assessment of SLOs and integrate assessment of SLOs into college processes.
- ❖ Expand tutoring services to meet demand and support student success in Basic Skills, CTE, and Transfer courses.

Indicate how this position will have a positive impact on the LPC's Mission and Planning Priorities:

Hiring a full-time regular staffperson to meet this need will help ensure that our front window provides customer service with a high level of understanding of the various financial aid programs, regulations, policies and procedures which vary from program to program. Additionally, it significantly frees up other staff so that they can focus on doing what is needed to get students paid as timely as possible, ensure compliance with the many state and federal mandates, and have time to work on other initiatives. A fully trained and experienced full-time front window staffperson whose main responsibility is providing excellent, accurate and complete information to our students and our community is essential in ensuring our students receive the level of service the college expects us to provide and will provide stability for the front window.

Indicate how this position will have a positive impact on LPC's Educational Master Plan:

In line with our mission statement, Financial Aid exists to provide access to our students who would otherwise not be able to afford college. However, the Financial Aid Office must maintain federal and state compliance above all, while striving to provide excellent support services to our students to ensure they receive the funding that is needed in a timely manner for retention and success in college. Access is only possible for many students through financial aid. With this new position, personal service to students will be greatly improved with a full-time employee whose main purpose is to provide a full range of information and advice to our students, thereby have a positive impact. This additional staff person will also serve all other duties normally covered by a Financial Aid Advisor I, and will assist other staff with projects as needed.

Indicate how this position will have a positive impact on Accreditation:

Positive impact on access and student success as we improve services. To continue to meet Standard II.B. (Student Support Services) additional staffing is a necessity in enabling us to provide a more professional, personalized and higher level of service, freeing up time for other full-time staff to handle the workload and to help ensure the college maintains compliant.

SECTION 4: PROGRAM REVIEW AND IMPACT

Indicate how this position will have a positive impact on your Program Review:

A staffperson whose main responsibility is to cover the front desk duties will provide 40 hours of relief to other staff who will be able to utilize that time to process files and work on other projects. With additional staffing to relieve some of the pressure, it may allow us to begin to implement some of the long-term goals we have had in our program review, but which we have not been able to begin to implement at our current staffing level.

Indicate other alternatives that have been considered in lieu of this position to meet programmatic demands:

We have utilized Equity funds to provide funds for the two on-call hourly staff currently covering our front desk. These funds are not permanent, and we are not even sure they will be available to us next year. While the on-call hourly positions meet the immediate needs of serving students, the level of service is less than ideal considering their limited knowledge and experience in financial aid, and the fact that there is always the possibility of turnover as these are not regular positions. I am not aware of any other funding alternatives or program options to meet this need.

Indicate the consequence of not funding this position:

There is a current inability for existing fulltime staff to meet the needs of students needing advisement. Students will not receive the full professional assistance they should be given when inquiring about financial aid in general or their own specific financial aid-related issues and questions if we have no choice but to continue the on-call hourly staffing. As a result, students may receive incomplete information, or incorrect information that a fully trained and informed full-time staff person would otherwise be able to provide. This can lead to students dropping out due to incorrect information. Should funding be discontinued for the on-call hourly, our current staff will once again have to fill in at the front desk, which will take them away from processing time and lead to potential delays in file processing and ultimately in students receiving their funds on time, resulting in students in class without books, a negative impact on retention and student success and significant stress placed on staff due to angst and complaints.

SECTION 5: COSTS*

Estimate Increase/Proposed Annual Salary Cost: \$ 45,929.00
Estimate Benefits Cost: \$ 22,964.50 23,000.00
Total Cost for Position: \$ 68,893.50 68,929.00

NOTE:


Full Time = 20-40 hours per week or 50% - 100%

Regular Hourly = 18 hours or less per week (<50%)

**Costs: For accurate costs below, requestor must contact College Administrative Assistant, Sharon Davidson, in the LPC Office of Administrative Services (ext. 1632).*

SECTION 6: REVIEWS


Signatures:



Requester

9/19/16

Date



College Administrative Assistant
Office of Administrative Services

9/27/16

Date



Dean/Unit Administrator

9/19/16

Date

Vice President

Date

CHABOT-LAS POSITAS COMMUNITY COLLEGE DISTRICT

FINANCIAL AID ADVISOR I FINANCIAL AID ADVISOR II

*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.*

SUMMARY DESCRIPTION

Under general supervision, perform a variety of complex duties involved in providing financial aid services and recommending available alternatives for students; process and verify student financial aid applications; develop and award student financial aid packages in accordance with prescribed policies, procedures, regulations and guidelines; exercise professional judgment to determine whether adjustments should be made regarding student eligibility; investigate, analyze information, and solve problems with students and campus and external entities; and certify qualified federal and state grant award amounts in accordance with federal, state and District guidelines.

DISTINGUISHING CHARACTERISTICS

Financial Aid Advisor I - Employees at this level are not expected to function with the same amount of program knowledge or skill level as employees allocated to the Financial Aid Advisor II level and exercise less independent discretion and judgment in matters related to work procedures and methods. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise.

Financial Aid Advisor II - Work at this level is distinguished from the Financial Aid Advisor I by the level of complexity and the degree of independence and judgment with which the employee is expected to perform. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise, and are fully aware of the operating procedures and policies of the work unit. Positions assigned to this classification perform office-related and people-assisting services that includes complex and varied tasks and requires a high degree of independent judgment.

REPRESENTATIVE DUTIES

The following duties are typical for this classification. Incumbents may not perform all of 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. Assist and advise students applying for federal, state and institutional financial aid programs; research available options and sources; discuss various eligibility criteria and explain ineligibility as necessary; interpret and explain the District's financial aid policies and procedures.
2. Provide students with proper applications, documents, forms and reading materials; order brochures, applications and forms as necessary; assist students in filling out and reviewing applications and supporting documentation for completeness and accuracy.
3. Analyze and verify financial data and evaluate student and parent ability to pay for education; evaluate and verify financial aid applications to determine eligibility requirements including parent and student income and assets, household size, untaxed income, investments and business assets and debts.
4. Prepare and award well balanced financial aid packages based upon determined needs; disperse award notification; advise students on terms, conditions, requirements and limitations of awards; resolve

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Financial Aid Advisor I & II (Continued)**

data conflicts and over-awards as necessary.

5. Maintain financial aid student records and other records by reviewing and updating pertinent data via remote computer terminal; review and prepare computer inputs under prescribed guidelines.
6. Participate in a full range of reporting duties; assist in compiling, analyzing, and maintaining data for the maintenance of various records and the preparation of various reports.
7. Maintain current knowledge and learn new state and federal laws, rules, and regulations pertaining to financial aid; attend seminars, conferences, workshops, and other training sessions; participate in the development of new/revised procedures to accommodate changes that will positively impact efficiency and quality of services provided.
8. Coordinate and oversee one or more administrative programs and/or service area as assigned.
9. Monitor, review and maintain Cal Grant rosters; determine student eligibility and award grants according to established parameters; report all applicant eligibility and payments.
10. Oversee the Student Loan Program; develop procedures to facilitate the student loan application and disbursement process; prepare and send loan application response letters.
11. Conduct presentations, workshops, and orientations to inform high school students, the community and various groups of financial aid program requirements and deadlines.
12. Interact with federal, state, scholarship, social services and related agencies and financial institutions to facilitate the student eligibility process.
13. Respond to inquiries and research and resolve problems related to transactions handled by the unit; serve as liaison with other constituencies in the resolution of day-to-day administrative and operational issues.
14. Train and serve as an operational resource to other staff and/or students, as appropriate; may supervise student employees or lower-level staff.
15. Utilize professional judgment to adjust a student's eligibility based on documented mitigating circumstances in accordance with federal statutes; may refer complex eligibility situations to the Director.
16. Provide support to students experiencing family, personal or economic crises which may impact school performance; work with special needs populations to identify unique needs and coordinate appropriate services.
17. Monitor and evaluate satisfactory academic progress, or academic eligibility, of students. Review and approve / deny student appeals relating to academic progress.
18. Perform related duties as required.

MINIMUM 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:

1. Student financial aid processes and procedures including federal, state, and local laws, policies, procedures, rules and regulations pertaining to student financial aid, grants and loans.
2. Methods and techniques of advising students regarding financial aid options and programs.

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Financial Aid Advisor I & II (Continued)

3. Methods and techniques of public relations.
4. Office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, and databases.
5. Principles of business letter writing and basic report preparation.
6. Principles and procedures of record keeping.
7. Effective oral and written communication skills.
8. English usage, spelling, grammar and punctuation.

Ability to:

1. Interpret, explain and apply District procedures and policies pertaining to financial aid.
2. Analyze and verify a variety of financial data and evaluate student ability to pay for education.
3. Determine eligibility of students for financial assistance through analysis and interpretation of data and guidelines.
4. Prepare and award well balanced financial aid packages based upon determined needs.
5. Identify student needs and assist students in locating financial alternatives.
6. Research regulatory information and resolve complex financial aid questions, to investigate, analyze information and draw conclusions.
7. Exercise good judgment and maintain confidentiality regarding critical and sensitive information, records, and reports.
8. Diffuse difficult, angry, or emotional situations with students and/or parents.
9. Prepare a variety of comprehensive and statistical reports.
10. Plan, organize and prioritize work in order to meet schedules and timelines.
11. Operate office equipment including computers and supporting word processing, spreadsheet, and database applications.
12. Respond to difficult inquiries and requests from students regarding financial aid options and programs.
13. Communicate clearly and concisely, both orally and in writing.
14. Establish and maintain effective working relationships with those contacted in the course of work.
15. Work with and exhibit sensitivity to and understanding of the varied racial, ethnic, cultural, sexual orientation, academic, socio-economic, and disabled populations of community college students.

Minimum Education & Experience - *Any combination of the following would provide a typical way to obtain the required knowledge and abilities.*

Financial Aid Advisor I

Education/Training:

Equivalent to completion of the twelfth grade supplemented by college level course work in business administration, accounting, or a related field.

Experience:

One year of responsible clerical experience in a related program area.

Financial Aid Advisor II

Education/Training:

Equivalent to completion of the twelfth grade supplemented by college level course work in business administration, accounting, or a related field.

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Financial Aid Advisor I & II (Continued)**

Experience:

Two years of experience including one year of experience performing duties at a level comparable to a Financial Aid Advisor I with the Chabot-Las Positas Community College District.

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 with frequent student and public contact.

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 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.

1/5/93;

Adopted by Board of Trustees on October 20, 2015

Effective: October 21, 2015

Job Family: Clerical-Secretarial-Fiscal