

NON-INSTRUCTIONAL POSITION REQUEST 2016-2017

Internal Use

#: 2016-18

Range 35

Requester Name: Andi Schreibman

SECTION 1: SUMMARY INFORMATION

Title of Position Being Requested:

Financial Aid Advisor II (Loan Specialist)

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

A new general position was presented to RAC in 2012-2013 as informational only, and was funded through financial aid BFAP categorical funds. There was no contribution from the general fund.

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:

In addition to all other regular tasks of the Financial Aid Advisor II in advising students and processing student files for federal and state financial aid payment, the primary focus of this position is to coordinate and be responsible for all functions associated with the Direct Loan program, and to greatly enhance the direct level of service currently provided. This includes advising students through personal loan counseling, personal followup with students regarding loan delinquencies and default prevention, implementing a default prevention plan in conjunction with the CCC Chancellor's Office, and responsibility for all electronic data functions related to loan origination and disbursement and reconciliation.

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 Penaflo, 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 = # Financial Aid Recipients/year	>	<u>2006</u>	=	<u>1,972</u>
		<u>2014</u>	=	<u>4,702</u>
Change over time is:			=	<u>138.0</u>

Workload unit 1 = # Financial Aid Recipients/year	>	<u>2010</u>	=	<u>3,749</u>
		<u>2014</u>	=	<u>4,702</u>
Change over time is:			=	<u>25.00</u>

Comments:

Currently there is no designated staff person responsible for loans or fully trained to provide loan counseling and followup services. Due to our understaffing and workload, we cannot afford the time to provide students with personal service or advice; we provide only the minimum service mandated which is to have students complete the Dept of Ed's online loan counseling and exit counseling. This meets compliance but provides poor service and does not ensure full understanding of the complexities of borrowing and long term affects. Many students borrow loans without understanding the potential impact on their future, and without an understanding of how they could better budget and live within their means. It is possible this position, working with the EOPS Program, could also be responsible to coordinate and implement our CashCourse Financial Literacy program which we have available to us for free through the Chancellor's Office but which we cannot implement with the current level of staffing. This has been on our wish list for many years and is possible to implement but only with adequate staffing.

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:

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, loan services will be greatly improved with a dedicated person to coordinate all aspects of the program, provide personal loan counseling to students, as well as thereby have a positive impact on our students. This additional staff person will also serve all other duties normally covered by a Financial Aid Advisor II, including review and processing of files.

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

Improvement in offering a more professional level of student support services, improved community collaboration through liaisons in high schools and improved ability to provide workshops to students on campus and in the community. For example, we are often asked to provide high school workshops but we do not have the staffing to meet this community need. With additional staffing we can begin to do more targeted outreach and better serve our community. We have had to stop presenting at MathJam due to workload, but would like to be able to provide this valuable inreach service to our students. Additional staffing will enhance our abilities in many ways.

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

Positive impact on access and success as we improve services. To continue to meet Standard II.B. (Student Support Services) additional staffing is a necessity as we will be able to provide a higher level of service and more personalized service, while better ensuring the college maintains compliant.

SECTION 4: PROGRAM REVIEW AND IMPACT

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

Additional staffing would enable us to begin to initiate some of our longstanding goals and initiatives to provide a full service comprehensive office...increased numbers of student scholarship applicants, partnering with the new outreach position to educate more students to apply for aid, default management, loan counseling, implementation of financial literacy program (CashCourse), outreach and inreach, implementation of additional enhancement functionality within banner, etc., all initiatives that are clearly needed but which we cannot provide under the current circumstances.

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

The college has not increased funding for financial aid in the past 15 years. It underwrites the salaries and benefits of only 1.5 staff (.5 FTE FA Advisor II and the 1 FTE Financial Aid Officer). In 2005-06 the college paid a total of \$188,076 in salaries and benefits for financial aid administration; in 2014-15 it paid \$174,156. During the same time period financial aid has grown from providing \$2.5 million to 1862 students in 0506 to providing \$10.4 million to 4702 students in 2014-15. Categorical BFAP funds cover the remaining 3.5 staffing costs, but funding has been relatively flat and overall the funding has been effectively reduced annually due to increased salary and benefit costs. There has been extreme increased demand for all financial aid services, as evidenced by our statistics. While we have considered other options, without additional funds and with the current level of understaffing we are only able to focus attention on striving to keep compliant and focusing on getting files reviewed and students paid as quickly as possible. We have no other options to meet these needs which must be provided by highly trained staff.

Indicate the consequence of not funding this position:

Students may not be well-informed because we do not provide personalized loan advising or follow-up regarding repayment responsibilities; we cannot handle this required function with current staffing level. Our Fin Aid Advisor III is currently performing all duties related to loan processing, as no other current staff have the skill set but this is impacting her ability to complete her own accounting responsibilities. We do our students a disservice by not providing them one-on-one assistance with the loan program, as ultimately a default reflects very negatively on the college and can impact a student's financial wellbeing for the future. Implementing CashCourse will continue to be delayed. Our ability to provide financial aid workshops and outreach will continue to be limited; this can lead to negative retention and success. With both the federal and state governments increasing the regulatory burden exponentially over the past few years, without addnl staffing we are at risk of non-compliance, which can be very costly. We are already experiencing over the past two years a decline in our applicant and recipient numbers attributed to our inability to provide needed services to our students, including inreach; this could easily be reversed with additional and adequate staffing.

SECTION 5: COSTS*

Estimate Increase/Proposed Annual Salary Cost:	\$	<u>49,569.00</u>
Estimate Benefits Cost:	\$	<u>24,784.50</u> 25,000.00
Total Cost for Position:	\$	<u>74,353.50</u> 74,569.00

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