

# NON-INSTRUCTIONAL POSITION REQUEST 2017-2018

Internal Use

#: 2017-16

Requester Name: Andi Schreibman

## SUMMARY INFORMATION

Title of Position Being Requested: (Note: Please also attach a current or proposed district job description)  
Financial Aid Advisor I (front desk)

**Position Will Reside in Division/Unit:**

Student Services/Financial Aid

**Indicate To Whom this Position Reports:**

Andi Schreibman, Financial Aid Officer

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

yes, in 2016-17

**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 1: PROGRAM NEED**

### **What key responsibilities would this person assume?**

Primarily assigned to the Financial Aid front counter. 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. Must be 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 filing system, help resolve student issues and problems with respect to financial aid, help students with BankMobile account setup and 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.

### **List other Personnel in the Unit (i.e. with shared or similar responsibilities):**

Lydia Penaflor, Financial Aid Advisor II  
Amy Rel, Financial Aid Advisor II

Both staff work the front desk when additional coverage is needed, but perform financial aid functions at a much higher level than this position would be required to do. The existing staff are each responsible for coordinating specific programs within financial aid as well as advanced review and processing of student verified and non-verified files. We have had two 25 hour/week on-call hourly trained staff performing these duties for the past two years, but the positions are terminated by HR effective December 31, 2017. Our limited full-time Financial Aid Advisor II staff will have to be responsible to occupy the front desk after this time, impacting their ability to perform other assigned duties.

**Give a historical perspective of the changing demands on your unit's staff over the past 3-5 years (look to your program review). Please describe the metric you use to determine staffing needs in your program:**

<i><b>Example:</b></i>			
<i>Metric =</i>	<i>Students Served per semester / Full-Time Equivalent Employees</i>	<i>2010</i>	<i>= 900/1</i>
		<i>2015</i>	<i>= 1000/1</i>
	<i>Increased demand over the past 5 years is:</i>		<i>= 11%</i>

Metric =	Financial Aid recipients	0607	=	1972
		1617	=	4250
	<b>Increased demand</b>		=	+116%

**And/or provide additional information supporting a need for this position and resulting impact on students or program:**

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 simultaneously. For the past 2 years we have employed two 25-hour/week on-call hourly Financial Aid Advisor I's to meet this immediate need.

Our two hourly staff are very well-trained and meet our program/front counter needs perfectly. However, we have been advised by Human Resources that the hourly positions will be terminated after the fall term, once a replacement is hired for our current vacant position of Financial Aid Advisor II. Our current staff will once again have to fill in at the front desk to make up for 50 hours/week less in front desk staffing, 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.

All other areas of student services with a front counter have full-time staff whose responsibility is to provide customer service at the counter. However, until we moved into Building 1600, the Financial Aid Office never had a front counter, so we had no need for a front counter staffperson. Our needs were met with the on-call hourly staffing, but that will no longer be an option for us.

Relying on our other full-time staff to cover the work previously covered by 50 hours of additional staff time means we will not be able to expand our drop-in office hours which have remained restricted due to understaffing, and there will be increased bottlenecks in processing files, and paying students with significantly less available hours to do the required work in processing files. With the addition of a full-time front desk staffperson, we would be able to expand our open hours, as well as allow our full-time processors to focus on their tasks full-time.

## **SECTION 2: STUDENT LEARNING AND SUCCESS**

### **Explain how this position will contribute to and/or support student learning and success:**

By allowing a well-trained full-time Financial Aid Advisor I to cover the front counter needs, the remaining staff can focus on their assigned tasks and maintain focus on processing files as quickly as possible so that students can be paid in as timely a manner as possible. By receiving funds in a timely manner students will be able to purchase books in time for class, and will have their funds to cover other educationally-related expenses, thereby supporting them to be successful academically.

### **Explain how this position will have a positive impact on Accreditation or strengthen the college's adherence to the ACCJC standards:**

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 3: LPC MISSION AND PLANNING PRIORITIES**

#### **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 supports the College's mission and/or planning priorities:**

Hiring a full-time regular staffperson to meet this need will help ensure that our front counter provides consistent customer service through an assigned regular staff person which is a positive. More importantly 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 counter staffperson whose main responsibility is providing excellent, accurate and complete information and customer service 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 coverage of the front window.

## **SECTION 4: PROGRAM OUTCOMES, INITIATIVES, and PLANS**

**Please check one.**

- This need was described explicitly in a Program Review (Year 2017-18).
- This need was implied in a Program Review (Year \_\_\_\_\_).
- This need was not included in a Program Review, but has become a need since that time.

**Explain, including language from Program Review (if available):**

Termination of on-call hourly positions throughout the district in 2017-18 will result in the loss of our two front-desk hourly staff, who covered 50 hours/week for the past two years. Full-time staff will have to share and cover front desk duty beginning January 2018, resulting in less time per staff person to be available on a daily basis to process files, answer and return phone calls and email. The need for a full-time staffperson responsible for the front counter is evident, as the loss of our hourly positions further reduces the time full-time staff will have to process.

We are the only area of student services with a front counter and no full-time assigned front counter staff person. This is due to the fact that our former office configurations never had a front counter until moving into Building 1600, so the need for front counter staffing was a non-issue until the move. The need has been covered by hourly staffing but that is no longer an option.

## **SECTION 5: SAFETY (if applicable)**

**Explain how this position will improve safety on campus or within your unit:**

**SECTION 6: COSTS\***

Estimated Increase or Proposed Annual Salary Cost:	\$	<u>47,307</u>
Estimated Benefits Cost:	\$	<u>23,650</u>
Total Cost for Position:	\$	<u>70,957</u>

SD

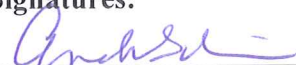

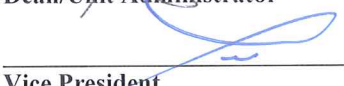
**NOTE:**

Full Time = 20-40 hours per week or 50% - 100%  
Regular Hourly = 18 hours or less per week (<50%)

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

**SECTION 7: REVIEWS**

**Signatures:**

<u></u>	<u>10/25/17</u>	<u></u>	<u>10.25.17</u>
Requester	Date	Dean/Unit Administrator	Date
<u>Sharon Davidson</u>	<u>10/20/17</u>	<u></u>	<u>10/25/17</u>
College Administrative Assistant Office of Administrative Services	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