

NON-INSTRUCTIONAL POSITION REQUEST 2017-2018

Internal Use

#: 2017-17

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 II

Position Will Reside in Division/Unit:

Enrollment Services/Financial Aid

Indicate To Whom this Position Reports:

Andi Schreibman

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

This position was presented to RAC in 2016-17, and was initially supported by the president for funding through Equity; however, the funding was never approved as it was determined that Equity funds were not an appropriate source based on program requirements for this specific position.

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?

In addition to all other regular tasks of the Financial Aid Advisor II including advising students and processing student files for financial aid payment, the primary focus of this position is to coordinate and be responsible for all functions associated with the Scholarship Program. This includes responsibility for coordinating all aspects of the LPC Scholarship program in conjunction with the LPC Foundation from beginning to end. This includes maintaining donor contact and securing confirmation of scholarships to be offered annually, setup and testing of the electronic scholarship software program annually, advertising/communication to staff and students, organization and coordination of the scholarship review committee and dissemination of applications to be reviewed, coordination of the annual scholarship ceremony in its entirety. May provide scholarship application workshops to students. Also includes maintaining an Outside Scholarship list, and directly assisting students with information and skills to research other scholarship opportunities. The scholarship part of the workload is in addition to all other regular functions of the Financial Aid Advisor II.

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

Andi Schreiberman, Financial Aid Officer, has been managing the scholarship program for 30 years, as there has not ever been sufficient support staff to assign this program to.

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:

Example:

$$\text{Metric} = \frac{\text{Students Served per semester}}{\text{Full-Time Equivalent Employees}} \quad \begin{array}{l} 2010 = \underline{900/1} \\ 2015 = \underline{1000/1} \\ \text{Increased demand over the past 5 years is:} = \underline{11\%} \end{array}$$

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

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

Currently there is no designated staff person responsible for the scholarship function, and all functions of the LPC scholarship program continue to be performed by the Financial Aid Officer ('FAO'), as they have been for the last 30 years! We have reached a critical point where this is no longer possible due to the increased compliance and programmatic demands of the Financial Aid Officer position. With our current level of staffing, we have no support staff who can take over this scholarship responsibility, as they are needed for the other mandated functions required on a daily basis to serve our students and maintain compliance. We are desperate for a dedicated staffperson to take over these responsibilities permanently in order to better serve our students and relieve the Financial Aid Officer of these clerical and extremely time-consuming duties.

Tasks and responsibility for scholarships, both outside scholarships and the LPC Scholarship Program, are carried out throughout the school year, but is particularly demanding of time in the spring term preparing the online application for the annual LPC Scholarship Program, advertising, organizing and setting up the reviewers, coordinating selection of the recipients, notification, and planning and organizing the Annual Scholarship Ceremony. This job requires a significant part of the workweek for approximately a 2 month period every spring, and is not an appropriate use of the Financial Aid Officer's time and expertise. The program has grown significantly over time and now needs to be part of the assignment of a full-time staff person rather than the Financial Aid Director. However, without additional staff, current staff cannot maintain their current workload and absorb this very time consuming responsibility as well.

Additionally, average workload has increased phenomenally when looking at numbers.

- 2005-06 we had 3 staff to assist 1862 aid recipients, or 620 students/staff.
- 2010-11 that increased to 4 staff serving 3749 recipients (937 students/staff)
- 2014-15 we had 4 staff serving 4702 recipients (1175 students/staff)
- 2015-16 we had 4 staff serving 4577 recipients (1144 students/staff)
- 2016-17 we had 4 staff serving 4208 aid recipients (1052 students/staff).

Since 2012 there have been extensive federal and state regulatory changes that have significantly impacted our workload as program requirements and verification requirements for financial aid have become far more complex and regulated, and several new state programs have been added creating significant manual workload over what was previously required.



SECTION 2: STUDENT LEARNING AND SUCCESS

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

With an additional Financial Aid Advisor II who is responsible for the Scholarship program (in addition to all other tasks of the Advisor II) we will be able to provide expanded services to our students, more focused outreach, and will be able to move responsibility for coordinating the details of the program from the Financial Aid Officer to a staff person, which is a more appropriate use of her time. An additional staffperson will allow us to have expanded front counter hours, provide additional financial aid inreach and outreach, and with the additional staffing will allow us to take on other initiatives which we have been unable to pursue due to understaffing, such as putting into place a financial literacy program and serving foster youth and other targeted populations. This will allow us to better serve our students and better support their academic success.

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

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. This position would positively impact our provision of access and will support student success as are able to expand our level of services, including offering additional programs and enhancements to existing programs.

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 an additional full-time regular staffperson to coordinate the scholarship program will help better support our students by providing improved outreach to our students with respect to scholarships; this supports the college's mission of providing support for students so that they can pursue educational opportunities and complete their academic goals. The scholarship program would be greatly enhanced by a dedicated staffperson who can provide workshops, better dissemination of information, and would partner with the LPC Foundation to recruit additional scholarship opportunities.

SECTION 4: PROGRAM OUTCOMES, INITIATIVES, and PLANS

Please check one.

- This need was described explicitly in a Program Review (Year 2017).
- 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):

From Program Review: Hire a new Financial Aid Advisor II whose program focus would be Scholarships. With new software, the scholarship program has become very technical. Having a staffperson whose focused assignment is the scholarship program is greatly needed. The tasks involved are extremely time consuming for a preparatory period in the fall term and again in the spring term when the LPC Scholarship Program is offered. Scholarships require focused attention for the majority of the workweek over at least 8 week period each spring. Having a staffperson responsible for this will relieve the Financial Aid Officer of this workload.

SECTION 5: SAFETY (if applicable)

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

Range 36 Step 1

SECTION 6: COSTS*

Estimated Increase or Proposed Annual Salary Cost:	\$ 52340
Estimated Benefits Cost:	\$ 26170
Total Cost for Position:	\$ 78510

OK SMO

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:

Archie Smith
 Requester

10/25/17
 Date

[Signature]
 Dean/Unit Administrator

10.25.17
 Date

Sharon Davidson
 College Administrative Assistant
 Office of Administrative Services

10/26/17
 Date

[Signature]
 Vice President

10/25/17
 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