

IMPERIAL VALLEY COLLEGE

Student Services Specialist – Financial Aid

BASIC FUNCTION:

Under the direction of the director of financial aid, plan, organize, coordinate and participate in the day-to-day activities of the financial aid department in such a manner as to enhance and promote its overall efficiency and effectiveness; support staff, students, other college representatives, and the public; coordinate communications; process materials not requiring the attention of the director; prepare financial and statistical reports and other documents using automated equipment.

REPRESENTATIVE DUTIES:

Provide support to resolve problems within the department that do not require approval of management; orient assigned staff to policies and procedures of assigned areas and of the College.

Perform complex and responsible administrative assistance duties requiring specialized and extensive knowledge of the financial aid department. Assume responsibility for a variety of specialized functions and projects related to the financial aid department as directed by the financial aid director.

Serve as liaison between/among division, departments and programs, and various College services to accomplish tasks and resolve procedural and/or documentation problems; work with the director of financial aid to determine appropriate actions or changes to existing policies and procedures; establish and revise work priorities or independently assure the timely completion of assignments.

Coordinate, organize, monitor and process the paper/work flow of the financial aid department; analyze, organize and facilitate office operations and procedures in a manner consistent with College policies and procedures.

Evaluate office production, revise procedures or devise new forms to improve efficiency of workflow; plan office activities and work projects and assign student workers or clerical assistants to carry out and complete specific projects and duties when available.

Maintain a variety of complex files and records of district and categorical expenditures and monitor budget balances; compile and consolidate information to prepare budgets and estimate annual categorical expenditures; transfer funds; and process purchase orders.

Determine need and prepare work orders pertaining to unexpected emergencies, facility needs and routine requirements; order, receive, store and issue office supplies; assure proper operation of computers, peripherals and other office equipment; request service and repairs as needed.

Compose, type, format, proofread, revise, generate, duplicate and distribute correspondence, reports, lists, summaries, contracts, forms, requisitions, applications, memoranda and other documents; including material of a confidential nature.

Schedule and send financial aid emails to large groups of students on a daily, weekly and monthly basis or as scheduled. Monitor financial aid email and respond to students when necessary.

Responsible for creating, editing, maintaining and updating financial aid webpages and College Consumer Information webpage. Uploading forms, marketing flyers and consumer information to

webpages. Embedding and uploading financial aid videos to website using appropriate web application and/or publishing software.

Develop, manage, and maintain policies and procedures in collaboration with the director of financial aid to ensure appropriate administration of the financial aid programs and fiscal accountability.

Create, customize, edit and update financial aid forms and marketing materials. Develop and coordinate financial aid marketing campaigns.

Assist in obtaining quotes; communicate with vendors to obtain current prices, shipping and availability information as requested; place orders with vendors upon approval. Obtain the status of orders to secure the timely delivery of materials ordered.

Prepare and maintain comprehensive records related to purchase orders, special orders, and retrieve data to generate reports as required.

Assist financial aid director in organizing and coordinating workshops, trainings, student events and local Region X meetings. Prepare agenda items for meetings, take and transcribe minutes and distribute to appropriate personnel.

Determine eligibility for students in the AmeriCorps program and distribute checks to students from AmeriCorps and other state programs. Monitor outside resources provided to students from various campus departments and updating database accordingly.

Receive, screen, post, copy and distribute all e-mail as appropriate; receive, sort, screen and distribute U.S. and inter-district mail.

Maintain calendars and schedules of appointments, meetings and conferences as assigned; arrange travel requests; transportation and hotel accommodations and process required documentation; arrange and attend meetings and conferences as assigned; prepare agendas and background materials.

Train, supervise, direct and prioritize work activities of temporary, hourly or student office assistants as assigned; provide evaluation input to assigned supervisor for performance appraisals of office assistants as required.

Perform other related duties as assigned

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

- Financial Aid laws, rule and regulations
- Operation and organizational methods of the financial aid office
- Modern office practices, procedures and equipment including a word processor and a personal or online computer and appropriate software; letter and report writing;
- telephone techniques and etiquette.
- Financial and statistical record-keeping principles and practice
- Microsoft office; excel required, adobe acrobat preferred
- Office management techniques.
- Correct English usage, spelling, grammar, punctuation and composition.

- Oral and written communication skills.
 - Interpersonal skills using tact, patience and courtesy.
 - Basic functions, procedures and programs of an educational institution.
 - Principles of supervision and training.
 - Use and processing requisitions, budget transfers, purchase orders, invoices and related documents.
- Use of standard office software, including word processing at an advanced level.

ABILITY TO:

- Read, interpret, apply and explain financial aid policies, procedures and regulations directives and reports.
- Compile information and compose routine documents, reports, office correspondence and procedure manuals using correct English usage, grammar, spelling, punctuation and vocabulary.
- Prepare, read and comprehend a variety of job related forms, reports, spreadsheets, records, documentation and correspondence in all languages required by the job.
- Communicate effectively in English and Spanish both orally and in writing.
- Operate microcomputers, peripherals, software, typewriter, scanner, calculator, copier, facsimile machines, and other office machines.
- Analyze situations accurately and adopt an effective course of action.
- Train and provide work direction to others.
- Meet demanding schedules and multiple and conflicting timelines.
- Prepare and maintain accurate statistical and financial records.
- Establish and maintain effective and cooperative working relationships with others.
- Work confidentially with discretion.
- Complete work with many interruptions.
- Work effectively and independently with minimal supervision.
- Exercise good judgment and discretion in analyzing and resolving confidential, difficult and sensitive situations.
- Prepare, review, verify, and process purchasing forms and documents.

EDUCATION AND EXPERIENCE:

Associate Degree in business, public relations, social science or other related field and three years of increasingly responsible clerical or office coordination experience, including at least one year in the financial aid field.

WORKING CONDITIONS:

Duties are primarily performed in the financial aid environment while seated at the desk, computer terminal or counter subject to continual interruptions. The work environment is sometimes noisy.

PHYSICAL DEMANDS:

Incumbents in this class regularly sit for long periods of time, walk short distances, use hands and fingers to operate an electronic keyboard or other office machines, reach with hands and arms, stoop or kneel or crouch to file, speak clearly and distinctly to answer telephones and to provide information; see to read fine print and operate computer; and hear and understand voices over telephone and in person; and lift, carry and/or move objects weighing up to 25 pounds. Incumbents frequently travel to other campus locations to attend meetings, conduct work or to pick up or deliver materials.