



WESTMONT

Director of Student Financial Services **Student Financial Services Office**

Overview:

Westmont College is an undergraduate, residential, Christian, liberal arts community serving God's kingdom by cultivating thoughtful scholars, grateful servants and faithful leaders for global engagement with the academy, church and world. Nestled in the foothills of Santa Barbara, California, Westmont serves more than 1,200 students across 30 academic majors, with an emphasis on students studying abroad for at least one semester. Affordability is a focus at Westmont, with the college offering a comprehensive financial aid program that includes state and federal grant and loan programs, institutionally-funded scholarships and grants, and an internal interest-free loan program. More than 97 percent of students receive some form of financial aid.

Working in collaboration with the Vice President for Finance, the Director of Student Financial Services is responsible for the formulation and implementation of a financial aid program that provides resources to make Westmont accessible to current and prospective students, and for the accurate and timely generation and collection of student charges.

The Director manages the daily operations and supervises the professional staff of the Student Financial Services Office and is responsible for:

1. Leading the collaborative annual process to generate an agreed-upon financial aid awarding model and then allocating aid in accordance with that plan to assist in achieving the college's enrollment goals.
2. Informing and participating in discussions related to policies pertinent to student financial aid and student accounts/billing.
3. Overseeing the administration of all federal and state financial aid programs and ensuring compliance with all requirements.
4. Overseeing the student billing and account management processes.
5. Mentoring and promoting the professional development of the members of the Student Financial Services Office.
6. Communicating clearly and concisely with students, families, faculty and staff regarding financial aid and student payment policies and procedures.

Necessary Qualifications and Characteristics:

In light of job responsibilities, the Director should possess the following:

1. Personal affirmation of the Christian mission of Westmont College and the Community Life Statement and adherence to its behavioral expectations.
2. A Bachelor's degree is required; a Master's degree is preferred.

3. A minimum of five years of progressively responsible experience in student financial aid, preferably in private higher education. Supervisory experience is preferred.
4. Excellent written and oral communication skills with an ability to present complex information in an easily understood manner.
5. Ability to manage a high volume workflow office, organize and prioritize objectives, and manage deadlines.
6. Demonstrated ability to establish and maintain effective working relationships with faculty, staff, students, families, and other institutional partners.
7. The highest integrity in relationships and in the management of student and family financial information, including exercising the highest degree of confidentiality.
8. Creativity and flexibility in problem solving.
9. Ability to think critically and strategically in order to advance institutional enrollment goals.
10. Knowledge of NCAA Division II regulations related to athletic aid.
11. A proven self-starter and team player with high standards of excellence.
12. Sensitivity to the particularities of the higher education culture, and demonstrated skills to function well in a complex environment.
13. A thorough knowledge of federal and state regulations and the ability to quickly adapt to changing governmental regulations and institutional policies and procedures.
14. Proficiency with the use of technology, especially spreadsheet applications and financial aid software (i.e. PowerFaid).

Primary Duties and Responsibilities:

1. Package student financial aid awards for new students, review FAFSA applications, perform income verifications, and certify student and parent loan applications.
2. Counsel students and parents in person, by telephone and in writing, with an emphasis on customer service.
3. Accurately administer all Title IV aid programs.
4. Responsible for administering the Federal Pell Grant and California State Grant Programs and reconciling accounts with federal and state agencies and the Westmont Business Office.
5. Counsel students regarding the TEACH Program, Federal Direct Loans and private loans.
6. Engage with coaches and athletic administration staff in the awarding of athletic aid.
7. Actively participate in the college's NCAA Compliance Committee.
8. Coordinate outside scholarships and other aid funds received to ensure students will not be subject to over awarding.
9. Calculate institutional and federal aid refunds.
10. Oversee the timely and accurate generation of student bills and the collection of payments toward student accounts.
11. Oversee the timely and accurate generation of the annual 1098-T forms to students.
12. Responsible for timely and successful completion of the annual financial aid audit performed by external auditors.
13. Coordinate timely updates of student financial materials (i.e. consumer information, student financial services brochure, Westmont website, etc.).
14. Complete the financial aid portion of the FISAP annual report, as well as respond to various surveys (CCCU, CDS, NACUBO, etc.).

15. Regularly update knowledge of federal and state regulations by attending conferences, seminars and workshops.
16. Hire, mentor, train and evaluate the Student Financial Services staff and oversee the overall operation of the office and its operating budget.
17. Provide financial aid seminars for the prospective student Preview Days and other institutional events, as well as occasional seminars at local and regional high schools.
18. Serve as the college's primary contact with third-party financial aid consultants.
19. Engage in internal discussions related to financial aid awarding and how best to use financial resources to meet the college's enrollment goals for new and returning students.
20. Expectations for workplace demeanor include but are not limited to: working collaboratively and harmoniously with co-workers, customers and others by sharing ideas and resources willingly, constructively and positively; listening to and objectively and respectfully considering the ideas and perspectives of others; readily admitting and correcting personal mistakes; meeting commitments; keeping your supervisor and others who may be affected informed about work progress; addressing problems willingly and constructively to discover practical and lasting solutions acceptable to all parties; working promptly toward reconciliation and forgiveness during conflict; respecting the diversity of our community in words and deeds.
21. Perform other duties as assigned.

Reports to: Vice President for Finance

11-2022