Job Classification Specification

One Stop Counselor 3

Position Summary

Second level One Stop Counselor to serve as a mentor and resource to One Stop Counselors; handles escalated calls and questions, and serves as a back-up if manager is not available. Incumbents at this level often handle some of the most challenging behaviors and difficult situations related to academic success and financial matters; coaches and mentors the Customer Relations Representatives, and assumes responsibility for escalated situations from collegiate/departmental staff, academic advisers, and faculty. Position also plays significant role in leading outreach efforts and initiatives to increase graduation and retention rates.

Requires in-depth knowledge and experience. Solves complex problems; takes a new perspective using existing solutions. Works independently; receives minimal guidance. Acts as a resource for colleagues with less experience. Likely to act as an informal resource for colleagues with less experience. Represents the level at which career may stabilize for many years or even until retirement.

TYPICAL TASKS (These examples do not include all possible tasks in this work and do not limit the assignment of related tasks in any position of this class.)

Assigned with the lead role on counseling and advising on complex issues and problems regarding student academic and degree progress, as well as financial matters.

Serves as the experts on financial wellness, academic policies, and degree progress. Conducts thorough analysis on financial aid/student records to make final appeal, waiver, petition, decisions and/or to propose best solutions.

Collaborates with college advising and student services offices through outreach efforts across the campus community to promote collaboration and improved service to students. Has direct responsibility and accountability for increasing graduation and retention rates.

Develops curriculum and educational materials to support new initiatives. Provides ongoing training to staff to ensure they remain as experts in compliance for institutional, state, and federal regulations.
Leads committees to promote professional development and student success. Leads outreach efforts with campus community and partners to promote collaboration and improve services to students.

Participates in developing new initiatives and leads project to implement program enhancements.

Conducts independent diagnostics and problem resolution in a broad range of areas and issues. Exercises authority to implement changes and make exceptions to students’ financial and academic records.

Conducts one-on-one financial literacy and financial wellness counseling meetings for students and parents. Monitors individual progress of students’ financial and academic components and provides personalized plans or interventions to ensure optimal student financial status.

Provides in-depth counseling to students and parents with questions concerning a variety of matters such as financial aid eligibility, loan comparisons, course registration, student records, special circumstances, and estimated family contributions for tuition and fees.

Advises on federal, state and institutional regulations and assists decisions-making through weighing different options.

Counsels student veterans, service members, and their dependents to determine which Veterans Affairs and other military on eligible education benefits and available options.

**Operational Role**

Puts into effect what is required by defined job duties and clear objectives following established procedures and protocols; can alter the order in which work is performed but usually not the expected end result which can be improved, but not qualitatively changed.

**Scope of Measurable Impact**

Actions tend to facilitate work outcomes that meet general reporting requirements, internal checks and balances, regulatory guidelines, or similar results that promote the welfare of students, faculty and staff and safeguard the institution by providing necessary inputs to others in the form of information or finished materials.

**Independence and Decision-Making**

Actions tend to be guided by schedules, due dates, and clear deliverables -- supervision only generally occurs when there are repeat problems or missed deadlines.

**Complexity and Problem Solving**
Issues are varied; problems tend to be technical in nature and are solvable through deep technical know-how and imaginative workarounds.

**Required Qualifications**

BA/BS plus at least 4 years of related experiences or master degree plus 2 years related experiences. Certification in Personal Financial Management; often the senior-most individual contributor in a department to whom other more junior employees go to for technical guidance.

Effective 6/1/15