

**San Joaquin Valley College**  
**Job Description**

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**Job Title: Financial Literacy Specialist**  
**Department: Student Services**  
**Reports To: Director of Student Services**  
**Status: Full Time, Non-exempt**

**Summary:** In relation to contributing to SJVC's mission and goals, under direct supervision of the Director of Student Services, the Financial Literacy Specialist will be responsible and accountable for contacting designated student groups to support with loan repayment education, preparing students to repay their educational loans. This position requires fundamental knowledge of loan repayment plans and default prevention best practices. The Financial Literacy Specialist will have a high degree of accountability for developing student loan education programs to reduce cohort default rates for assigned student groups and/or campuses. Students will be contacted in-person at the campus and through strategic student outreach including outbound/inbound calls, text and email.

**Essential Duties and Responsibilities:**

- Develop and implement loan repayment education programs, focusing on "at-risk" student groups
- Counsel students on loan repayments options and qualifying criteria
- Conduct Exit Counseling with assigned groups of outgoing students to increase exit counseling completion rates
- Support and assist students selecting the appropriate loan repayment options and assist with application process as needed
- Counsel students on personal financial problems and assist with identifying potential solutions
- Collaborate with appropriate external vendor resources to identify areas of opportunity for CDR (Cohort Default Rate) reductions
- Work with students who are behind on federal loan payments and help them avoid defaulting on the loans
- Encourages students to return to SJVC active status if appropriate
- Performs other duties as assigned

**Supervisory Responsibilities:** This job has no supervisory responsibilities.

**Competency:** To perform the job successfully, an individual should demonstrate the following competencies:

**Core Competencies**

Integrity – Acts in a way that demonstrates personal integrity; serves as a positive example of why others should trust the motives of the organization; views self as a reflection of the organization by following through on commitments and accepting ownership of mistakes; leaves others with the clear impression that integrity is a core organization value.

Professionalism – Approaches others in a tactful manner; reacts well under pressure; treats others with respect and consideration regardless of their status or position; accepts responsibility for own actions; follows through on commitments.

Adaptability – Adapts to changes in the work environment; manages competing demands; changes approach or method to best fit the situation; able to deal with frequent change, delays, or unexpected events.

Organization support – Follows policies and procedures; completes projects and tasks correctly and on time; supports organizations goals and values.

Communication - Communicates effectively and appropriately; uses good judgment as to what to communicate to whom as well as the best way to get that accomplished; speaks in clear and credible manner, selecting the right tone for the situation and audience; listens to others and allows them to make their point.

### **Job Competencies**

Conceptual thinking – Grasps concepts, patterns and underlying issues; uses past experience to help identify likely causes and solutions to problems that might otherwise seem to be unique events; helps others see patterns and concepts by using examples and analogies that relate well to their own experiences and current knowledge level.

Problem solving – Identifies and resolves problems in a timely manner; gathers and analyzes information skillfully; develops alternative solutions; works well in group problem-solving situations; uses reason, even when dealing with emotional topics.

Manage multiple priorities – Handles multiple assignments and priorities yet still fulfills all commitments; readily accepts new responsibilities and adapts well to changes in procedures; gives appropriate priorities to various work demands.

Handle difficult issues – Handles sensitive or difficult issues with grace and confidence; remains clear headed and focused and inspires others to do the same; remains objective in the face of strong emotions; can acknowledge strong emotions without being unduly influenced by their intensity.

Implementing policies – Ensure that new policies are understood and taken seriously; communicates new policies and procedures to employees, supports them with adequate and timely resources; monitors actual practices in a manner that makes it clear that full compliance is expected; avoids behavior or communications that might send a mixed message about the importance of new procedures or suggests that full compliance is optional.

**Qualifications:** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. This individual must be able to process a high volume of outbound and inbound calls on a predictive dialer, self-managing tasks and workflow to ensure all students are contacted in a timely manner and with the highest degree of customer service. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience – High school diploma or general education degree (GED) required along with one year of accounts receivable experience, preferably in an educational setting.

Language Skills – Ability to read and comprehend simple instructions, short correspondence and memos; ability to write simple correspondence; ability to effectively present information in one-on-one and small group situations to students, business representatives and employees of the organization.

Mathematical Skills – Ability to add, subtract, multiply and divide in all units of measure, using whole numbers, common fractions and decimals; ability to compute rate, ratio and percent.

Reasoning Ability – Ability to apply common sense understanding to carry out instructions furnished in written, oral or diagram form; ability to deal with problems involving several concrete variables in standardized situations.

Computer Skills – To perform this job successfully, an individual should have knowledge of Microsoft Office; Word, Excel, Access and Outlook, as well as Accounting and proprietary software used to maintain student records.

**Physical Demands:** The physical demands described here 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 functions.

While performing the duties of this job, the employee is regularly required to sit; use hands to fingers, handle, or feel; reach with hands and arms; talk and hear. The employee is frequently required to walk. The employee is occasionally required to stand; climb or balance and stoop, kneel, crouch or crawl. The employee must regularly lift and/or move up to 10 pounds, frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 50 pounds.

**Work Environment:** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate.