

## **TRANSFER SPECIALIST**

### **DEFINITION**

Under general supervision, develops, promotes, implements, and provides student support services to transfer students; coordinates university representative visits, transfer workshops and presentations, college fairs, and other related events; acts as a liaison to provide students with resources of assigned program to aid in furthering their education and successfully transferring to four-year universities and colleges; provides information to students, faculty, and other College staff; provides assistance for a wide variety of assignments related to the development and implementation of assigned programs, projects, and services.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives general supervision from the assigned managerial personnel. Exercises no direct supervision of staff. Provides technical and functional direction and training to temporary employees and staff.

### **CLASS CHARACTERISTICS**

This classification is responsible for performing specialized program implementation and outreach tasks in support of transfer services programs. The work has technical aspects requiring the interpretation and application of policies, procedures, and regulations and involves frequent contact with students, employees, and outside organizations. Incumbents at this level perform the full range of duties as assigned, working independently and exercising a higher level of judgment and initiative. Incumbents 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.

This classification is distinguished from other student services classifications in that it provides focused and specialized assistance to transfer students requiring a greater level of training and skill. This class is further distinguished from the professional counseling classifications in that the Transfer Specialists are Classified staff positions primarily concerned with assisting students with identifying and evaluating their transfer interests and requirements. Whereas counselors are faculty who provide instruction as well as academic, career, and personal counseling and develop student education plans. Transfer Specialists are not counselors and may not provide counseling services.

### **EXAMPLES OF ESSENTIAL FUNCTIONS (Illustrative Only)**

1. Meets with students on a one-on-one basis to identify and evaluate transfer interests; communicates with students on university/college transfer requirements, applications, admissions essays, and course planning; evaluates transcripts, classes, and grade point averages (GPA) in order to guide students through the transfer process.
2. Coordinates university representative visits, workshops, presentations, and events.

3. Organizes, schedules, and chaperones university/college campus tours and admission presentations; makes transportation and lodging arrangements for trips.
4. Markets upcoming programs, services, and events through various communication venues and social media; develops flyers, brochures, programs, and other marketing materials.
5. Coordinates and conducts workshops and presentations on various topics related to transfer programs; creates, develops, and revises workshop materials, handouts, and packets.
6. Oversees and schedules activities of the Transfer Center; maintains library of resources.
7. Facilitates presentations to students to provide information about transfer to four-year universities and colleges.
8. Assists with development, implementation, and marketing of transfer admission agreements and programs with California State University, University of California, and other universities/colleges.
9. Attends and participates in program-related community activities, advisory boards, and professional conferences and meetings concerned with the development and implementation of assigned programs and/or projects.
10. Compiles information and data for various reports; checks and ensures accuracy of the data.
11. Promotes an environment of belonging as it relates to diversity, equity, inclusion, social justice, anti-racism, and accessibility.
12. Provides quality customer service when interacting with the public, vendors, students, and College staff, including individuals from minoritized groups.
13. Supports and abides by federal, state, local policies, and Board Policies and Administrative Procedures.
14. Participates on committees, task forces, and special assignments, including, but not limited to, Screening and Selection Committees and mandated trainings as required.
15. Prepares and delivers oral presentations related to assigned areas as required.
16. Performs other related or preceding classification duties as assigned.

## **QUALIFICATIONS**

### **Knowledge of:**

1. Principles and practices of supporting a diverse, equitable, inclusive, socially just, anti-racist, and accessible academic and work environment.
2. Principles, practices, and service delivery needs related to the development and implementation of transfer programs.
3. Admissions, transfer, and application requirements, policies, and procedures of various in-state and out-of-state universities and colleges.
4. Procedures for planning, implementing, and maintaining a variety of presentations, activities, and programs.
5. Research and reporting methods, techniques, and procedures.
6. Principles and practices of data collection and report preparation.
7. Applicable federal, state, local, and College policies, codes, regulations, technical processes, and procedures related to the program to which assigned.

8. Modern office practices, methods, and computer equipment and applications to the scope of responsibility.
9. Techniques for effectively representing the College in contacts with governmental agencies, community groups, and various business, professional, educational, regulatory, and legislative organizations.
10. Techniques for providing a high level of customer service by effectively interacting with the public, vendors, students, and College staff, including individuals of various ages, disabilities, socio-economic levels and ethnic groups.

**Skills & Abilities to:**

1. Advocate for and communicate the College's vision and commitment to creating a diverse, equitable, inclusive, socially just, anti-racist, and accessible academic and work environment.
2. Participate in addressing gaps in diversity, equity, inclusion, social justice, anti-racism, and accessibility in the recruitment and retention of staff.
3. Participate in providing resources and support towards the goal of a diverse, equitable, inclusive, socially just, anti-racist, and accessible academic and work environment.
4. Plan, implement, and coordinate assigned program services, projects, and activities.
5. Prepare outreach activities, brochures, reports, and other related program materials.
6. Provide sound advice and coaching to students related to transfer services and processes.
7. Interpret, apply, explain, and ensure compliance with applicable federal, state, local and College policies, procedures, laws, and regulations.
8. Conduct research; analyze, interpret, summarize, and present technical information and data in an effective manner.
9. Compose and prepare basic reports, correspondence, and other written materials independently or from brief instructions.
10. Communicate effectively through various modalities.
11. Learn and apply emerging technologies and, as necessary, to perform duties in an efficient, organized, and timely manner.
12. Establish and maintain a variety of filing, record-keeping, and tracking systems.
13. Organize own work, set priorities, and meet critical time deadlines.
14. Review situations accurately and determine appropriate course of action using judgment according to established policies and procedures; understand scope of authority in making independent decisions.
15. Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

**Education and Experience:**

1. Equivalent to a bachelor's degree from a regionally or nationally accredited college or university with major coursework in education, social science, human services, or a related field; and
2. Two (2) full-time equivalent years of experience related to student services and/or in a transfer services center.

**Desirable Qualifications:**

1. Experience working with policies and procedures relating to diversity, equity, inclusion, social justice, anti-racism, and accessibility preferably in a minority serving institution such as Hispanic Serving Institution (HSI) and Asian American and Native American Pacific Islander-Serving Institution (AANAPISI); OR
2. Experience with participation in programs relating to diversity, equity, inclusion, social justice, anti-racism, and accessibility preferably in a minority serving institution such as Hispanic Serving Institution (HSI) and Asian American and Native American Pacific Islander-Serving Institution (AANAPISI).

**Licenses and Certifications:**

The incumbent may periodically be required to travel to a variety of locations. If operating a vehicle, employees must have the ability to secure and maintain a valid California driver's license.

**PHYSICAL DEMANDS**

Must be able to work in a standard office setting and use standard office equipment, including technological devices; communicate with individuals at various College and meeting sites; understand and comprehend written and electronic materials; receive, review, and respond to communications in person, before groups, and over and through various media. This is primarily a sedentary office classification although movement between work areas may be required. Positions in this classification occasionally may need to physically reach, push, and pull drawers open and closed to retrieve and file information. Incumbents must possess the ability to lift, carry, push, and pull materials and objects weighing up to 20 pounds.

**ENVIRONMENTAL ELEMENTS**

Incumbents work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Incumbents may occasionally work outdoors for assigned events and be exposed to loud noise levels, cold and/or hot temperatures, and dust, fumes, and allergens. Incumbents may interact with staff, students, and/or the public in interpreting and enforcing departmental policies and procedures.

Amended: 7/2023; 2/2025