



# Financial Wellness Peer position description

## Role overview

The Financial Wellness Peers (FWP) enhance awareness of the importance of managing personal finances as part of student success and provide support to students looking to improve their overall financial wellbeing through student-focused financial programming and information. Finances have been shown to be a significant contributor of stress for post-secondary students and the FWPs strive to provide the information and encouragement to students, in a fun and approachable way, to help them develop the skills and confidence to manage their money throughout their degree.

## Organizational Relationship

The Financial Wellness Peers are comprised of a group of students from all backgrounds who are interested in promoting financial wellness and helping other students access the information and resources and develop the skills they need to achieve this.

The Financial Wellness Peer program is managed by the Student Support & Advising Unit within Enrolment Services. The Student Support & Advising Unit, through Enrolment Services Advisors (ES Advisors) and Associate ES Advisors, provides support to students in person, by phone, and over email. Through their ES Advisors, students are able to receive personalized advising with issues such as exam and course scheduling, graduation, transcripts and diplomas, tuition and fee payments, and student financial support and budgeting. The FWP program is student-driven and also works to complement the overall financial wellness efforts and services of the ES Advisor team.

## Primary Functions

Financial Wellness Peers are thoughtful and reliable students who will receive training and participate in:

### **Student-Led Workshops**

- With the support of the program advisor, create, co-lead, or lead student workshops covering a variety of financial topics including budgeting (housing, food, etc.), student strategies for saving money, student loans, student loan repayment, understanding credit and debt, and planning for life after UBC

### **Campus Outreach**

- Actively connect with student groups on campus to promote financial wellness and the services and events offered by the Financial Wellness Peers and ES Advisors



- Seek out opportunities and locations to connect with students, e.g. within the Nest, GSS Loft, Life Building, Irving K Barber, residence, etc., about financial wellness topics and the services offered by the FWP's and ES Advisors. Also known as boothing.
- Utilize social media (Instagram, etc.) to share relevant financial related information and connect with students across campus to raise awareness of such info

## Research and Resource Development

- Conduct research on student money management trends, concerns, 'hot topics', and strategies and tools for managing money as a student to help inform services and resources offered by the Financial Wellness Peers and ES Advisors
- Look for new and exciting ways to increase financial literacy/wellness amongst students
- Research and prepare financial related blog posts for UBC related newsletters
- Prepare practical handouts and other resources to provide students during events

## Time commitments

### Important Dates

#### Mandatory Training for the 2019-2020 academic year:

- **Spring Welcome Training (all Peer Programs):** Saturday March 23, 2019 – full day
- **Summer Training:** Online training modules to be completed at your own pace. Students are also expected to participate in monthly check-in activities.
- **Peer Program Launch and Learn (all Peer Programs):** Sunday September 1, 2019 – full day
- **Core Team Training and Orientation:** Saturday September 7, 2019 – full day

### Mandatory Meetings

**Term 1:** Every Tuesday from 4:00 – 5:30PM, September 10 – November 26, 2019

**Term 2:** Every Tuesday from 4:00 – 5:30PM, January 7 – March 31, 2020

During meetings, you are provided with a chance to build connections, share your experiences, gain advice, and solve problems collaboratively. We also provide ongoing professional development and a chance to coordinate, organize, and provide feedback on projects.

### Weekly Commitment

Successful candidates will be expected to prioritize their involvement on this team and commit a minimum of 4 – 6 hours per week, including meetings noted above. Students will not be expected to volunteer during final exams weeks. The commitment can involve a combination of the following:

- 1.5 hours of training/meetings (Tuesdays 4:00 – 5:30PM), starting September 10, 2019
- 1 – 5 hours of team specific responsibilities (will vary depending on the time of year), which may include connecting with other FWP's to work on joint workshop, outreach, and research and resource development initiatives
- Occasional meetings with the program supervisor



## Desired skills and experience

We would like to recruit a range of students from all backgrounds including **direct-entry** (started at UBC directly after high school), **graduate, transfer, international, and aboriginal students** with the following skills and/or experiences:

- Strong communication skills (verbal and written) and interpersonal skills
- Demonstrated personal leadership and time management skills
- Demonstrated ability to take initiative and work well independently and within a team
- Basic knowledge of budgeting and/or general money management principles
- A strong desire to engage with and help other students with budgeting/money management tips, information, and resources
- Strong presentation and group facilitation skills
- Strong writing and research skills
- Comfortable with promoting information through social media (Instagram, etc.)
- Open to change, exploring new ideas, and providing and receiving feedback
- A commitment to exercising tact, professionalism, and non-judgmental help
- Well acquainted with UBC campus resources and/or student clubs/groups
- Ability to balance and manage multiply priorities through the school year, while maintaining good academic standing
- Basic photography and Photoshop skills are considered assets

## Benefits of participating in this role

### **Development of both personal and professional skills**

- Receive training on financial related topics, resources, and organizing workshops
- Develop leadership, presentation/group facilitation, and peer to peer skills
- Further develop communication skills, both verbal and written
- Practical project/event management skills
- Experience working with diverse teams, including peers and professional staff
- Develop professional references and expand your professional network

### **Involvement in the University Community**

- Team members are part of a larger community in Enrolment Services, as well as campus-wide, collaborating with other peer programs
- Develop positive relationships with students within the peer program, students you're helping, and professional UBC staff

### **Contributing to Increasing financial wellness among students**

- Participate in meaningful conversations that will assist students during their time at UBC
- Proactively assist students with increasing financial wellness and competency that will empower them to make sound money management decisions

### **Receive sponsorship to the annual UBC Student Leadership Conference**

- January 2020

### **Contact information for questions:**

financial.wellness@ubc.ca (attn: Cara Low, Enrolment Services Advisor)