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 to help them develop the skills and confidence to manage their money throughout their degree.

Organizational Relationship

The Financial Wellness Peer program is managed by the Student Support & Advising Unit within Enrolment Services. The Student Support & Advising Unit, through Enrolment Services Professionals (ESPs) and Associate Enrolment Services Professionals, provides support to students in person, by phone, and over email. Through their ESPs, 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.

Primary Functions

Financial Wellness Peers are thoughtful and reliable students who will receive training and be involved 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, student strategies for saving money, student loans, student loan repayment, and understanding credit and debt

Campus Outreach

- Actively connect with student groups on campus to promote financial wellness and the services offered by the Financial Wellness Peers and ESPs
- Seek out opportunities and locations to connect with students, e.g. within the Nest, GSS Loft, Irving K Barber, residence, etc., about financial wellness topics and the services offered by the Financial Wellness Peer Advisors and ESPs
- Work collaboratively with ESPs and Project Assistants (student staff) to organize and offer classroom visits promoting financial wellness topics and workshops
- Utilize social media to share relevant financial related information and connect with students across campus to raise awareness of such info
Writing and Research

- 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 ESPs
- Look for new and exciting ways to increase financial literacy/wellness amongst students
- Research and prepare financial related blog posts for the UBCfyi newsletter

Time commitments

Important Dates

Mandatory Training for the 2018-2019 academic year:

- **Meet and Greet:** March 20, 2018 (4:00pm - 5:00pm)
- **Spring Welcome Training (for all Peer Programs):** Saturday March 24, 2018 – all day (time TBD)
- **Summer Training:** Online training modules and a reflection of the previous year’s activities will be provided for your review. Students are also expected to review and respond to bi-monthly update emails/check-in activities
- **Peer Program Launch and Learn (for all Peer Programs):** Sunday September 2, 2018 – all day (time TBD)
- **FWP Training and Orientation:** Saturday September 8, 2018 – all day (time TBD)

Regular Meetings

**Term 1:** Every Tuesday from 4:00 – 5:30PM, September 11 – November 27, 2018

**Term 2:** Every Tuesday from 4:00 – 5:30PM, January 8 – April 2, 2019

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

Weekly Commitment

The Financial Wellness Peer program expected commitment is from March 20, 2018 – April 30, 2019. A minimum contribution of 5 to 6 hours per week is expected from volunteers as follows:

- 1.5 hours of training/meetings (Tuesdays 4:00 – 5:30PM), starting September 11, 2018
- 1 – 4 hours of team specific responsibilities (will vary depending on the time of year), which may include connecting with other FWPs to work on joint workshop, outreach, and writing and research initiatives
- Occasional meetings with the program supervisor (when needed)
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)
- Demonstrated personal leadership and time management skills
- Basic knowledge of budgeting, student loan programs, and/or general money management principles
- Practical application of budgeting knowledge and a desire to share tips with students
- Strong presentation and group facilitation skills
- Strong writing and research skills
- An interest in promoting information through social media (Instagram, etc.)
- Open to change, new ideas, and providing and receiving feedback
- Demonstrated ability to take initiative and work well independently and within a team
- 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 advisory skills
- Further develop communication skills, both verbal and written
- 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 2019

Contact information for questions

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