



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), provides support to students in person, by phone, and over email. Through their ES Advisors, students are able to receive personalized advising with financial support, budgeting, student loans, awards, tuition payments, and more. The FWP program is co-created by advisors and peers, and also works to complement the overall financial wellness efforts and services of the wider 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, understanding credit and debt, planning for life after UBC and other topics.

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 about financial wellness topics and the services offered by the FWP's and ES Advisors.
- Utilize social media 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

Time commitments

Important Dates

Mandatory Training for the 2023-2024 academic year.

- **Welcome Lunch** on Wednesday, April 12, 2023 from 11:00am-1:00pm. [This lunch can be missed if you have a course conflict]
- **Peer Program Launch and Learn (all Peer Programs) -online**
- **Summer Training:** Online training modules to be completed at your own pace. Students are also expected to participate in monthly check-in activities.
- **Core Team Training and Orientation – online and in person over the summer**

Mandatory Meetings

Term 1: Every Thursday from 3:30 – 5:00pm PST, from September 7 – December 7, 2022

Term 2: Every Thursday from 3:30 – 5:00pm PST, January 11 – April 4, 2023

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 (Thursdays 3:30pm-5:00pm PST)
- 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 advisor



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 Indigenous 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
- 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 photo editing skills are considered assets

The Peer Programs Program Advisors would like to recognize that being able to participate in student leadership opportunities are a privilege. The weekly commitment for each Peer Program varies in length but may not be feasible for some students who need accommodations based on chronic health conditions, disabilities, mental health, and/or other lived experiences. If you have specific accommodations with regards to your ability to participate and contribute to the program, please connect with the Program Advisor for the particular program you are interested in to discuss what accommodations can be made for your particular circumstance/situation.

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 (when offered)

- January 2024

Contact information for questions:

financial.wellness@ubc.ca (Kimberly Sicoli, Enrolment Services Advisor)