POSITION TITLE: IU MoneySmarts Team Assistant Director of Peer Financial Education

DEPARTMENT: Office of Financial Literacy, in partnership with the IU School of Public Health-Bloomington

LOCATION: IU Bloomington campus – main office hours conducted in the School of Public Health building

TERM: 2016-2017 academic year, 20 hours/week, 10.5-month assistantship with the potential for renewal in 2017-2018

POSITION DESCRIPTION:
IU MoneySmarts is a University system-wide program (extending to all 9 IU campuses) and is a product of the IU Office of Financial Literacy within the department of the Vice President and University Chief Financial Officer. MoneySmarts provides multiple opportunities for students to gain and enhance their personal finance skills and navigate the world of money management during and after college. One of the most effective ways we provide education unique to the needs of IU college students on all campuses is through peer financial education. Our peer-to-peer program, The IU MoneySmarts Team, currently exists on 3 campuses and is continually growing. It consists primarily of undergraduate students who conduct one-on-one appointments and group presentations for other students on a variety of personal finance topics. The MoneySmarts Team Assistant Director works collaboratively with the Team Director of Peer Financial Education and Office of Financial Literacy to supervise and train undergraduate Team members, and coordinate the program and Team’s schedules on the IU Bloomington campus. The Assistant Director role currently exists only on the Bloomington campus and reports to the MoneySmarts Team Director of Peer Financial Education (a faculty member in the School of Public Health-Bloomington) and the Office of Financial Literacy.

POSITION TERM AND BENEFITS:
The Assistant Director position is a 20-hour/week, full-time graduate assistantship appointment that includes medical and tuition benefits, with a stipend of $14,000 for the academic year and an additional $1,750 stipend for work during the summer.

- **Start Date:** July 1, 2016
  - Summer training for this position will take place with the Office of Financial Literacy (some travel dates may be required), the MoneySmarts Well-Being Consultant, and the Director of Peer Financial Education in Bloomington
  - Some financial literacy online training will be required prior to the appointment start date and early on in the position

- **Mandatory All-Staff Training:** August 19-20, 2016
  - Attendance at this training is required and non-negotiable

- **Additional Dates:** Attendance for the Asst. Director of Peer Financial Education is optional
  - June 15-17, 2016: National Summit on Collegiate Financial Wellness in Columbus, OH, co-hosted by the IU Office of Financial Literacy & financial wellness staff at The Ohio State University (http://nscfw.org)
  - Spring 2016 New-Hire Training Course: Tentatively set for Monday and/or Thursday evenings in Bloomington; Those local may attend to observe and/or actively participate
ROLE RESPONSIBILITIES:

- 55%: Supervise and train undergraduate student staff (approximately 10 students)
  - Build programming coordination skills, learn about money management, and actively participate in a program that connects the entire IU campus system with better education and tools on personal finance and overall health and wellness
  - Work alongside the MoneySmarts Well-Being Consultant and other administrative staff to train undergraduate student staff
  - Guide and provide oversight to student staff to ensure the Team’s preparation for individual and group appointments
  - Attend Team office hours, check in with peers when necessary, and answer questions
  - Training topic delivery will include but will not be limited to basic helping skills in working with other students, public speaking/presentation skills, and assessing and evaluating skill sets

- 30%: Serve in an administration role to the program and liaison between the Team and clients
  - E-mail, maintain and coordinate schedules, communicate with clients regarding appointments and special requests
  - Review and utilize client evaluations and Team debriefs to inform training practices and create initiatives for product improvement
  - Update transitional training materials for the next person who assumes this role

- 10%: Demonstrate an understanding of and cater to the staff professional development
  - Encourage personal and professional growth – meet student staff where they are in their development and in their understanding of financial concepts

- 5%: Promote IU Bloomington MoneySmarts Team resources and services across campus (this may or may not include small marketing projects)
  - Provide an engaging platform of personal finance education to students on behalf of and with the rest of the Team
  - Partner and attend events to better promote and inform other entities across campus about MoneySmarts to drive participation

- Provide services to campus student body with everyday money matters, including but not limited to establishing budgets, using credit cards, and managing student loan debt and repayment.

- Conduct appointments professionally with student-clients and potentially in meetings with faculty and staff
  - Build rapport with students
  - Provide non-biased, non-judgmental, accurate information and resources
  - Assist students to make goal-oriented, informed financial decisions
  - Learn and promote the MoneySmarts philosophy regarding financial education

- Learn (and in some cases, develop) the IU structure and MoneySmarts protocol to be better able to refer student-clients to appropriate offices if necessary

- Develop a working knowledge of resources available on the IU MoneySmarts website, on campus, and on similar sites relevant to this topic

- Work in collaboration with the Team Director of Peer Financial Education for additional Team needs as it relates to the Team’s training and continued delivery of high-quality service delivery
POSITION QUALIFICATIONS (in order of importance):

- **Coaching** – Understanding basic helping skills and multicultural competency with a willingness to learn and be challenged by cases that require executing them; Experience in working one-on-one with undergraduate and graduate students highly desirable; Ability to demonstrate empathy, active listening and communication, and presence in coaching environments; Build rapport in training and coaching settings
- **Mentoring** – Interest in training and supervising students and providing basic education in money management skills to other students in one-on-one and group settings; Serve as a supervisor and potential mentor to student staff
- **Organization & Attention to Detail** – Supervising and scheduling staff coverage; Managing schedules of full team while maintaining own schedule and continuing to provide strong product delivery
- **Professionalism** – Strong work ethic and professionalism in a fast-paced and ever-changing program environment
- **Leadership & Teamwork** – Ability to work with others from different backgrounds and levels of understanding of personal finance; Ability to coordinate team efforts, provide guidance on tasks; Comfort supervising and training peers
- **Customer Service** – Willingness to market the MoneySmarts program in order to develop partnerships across campus; Ability to “sell” the program and how its available services can benefit other entities on campus (classes, programs, organizations, departments, etc.); Deliver high-quality services related to personal finance in the form of coaching and presentations
- **Personal Finance Skills** - Applicants need not be experts in personal finance but have some familiarity with concepts around budgeting, credit, savings, and other finance topics as they relate to college student financial wellness
- **Presentation Skills** – Willingness to learn and be comfortable presenting on money management topics; Ability to train others to build comfort with public speaking
- **Communication** – Strong written, verbal, and interpersonal skills with the ability to build rapport quickly
- **Discretion & Judgement** – Ability to maintain confidentiality of student data; Ability to anticipate consequences of own actions as they relate to the creation and dissemination of information and the ability to make sound decisions with ambiguous resources
- **Computer Technology** – Ease with communicating via e-mail and utilizing Microsoft products, including Outlook and Office products; Willingness to adjust to various online software products, including a scheduler and polling software
- **Personal Experience/Interests** – Willingness to invest in own professional development and re-invest in the program the skills that suit you in pursuing your career

APPLICATION INSTRUCTIONS AND CONTACT INFORMATION:
For applicants local to Bloomington, the Office of Financial Literacy will conduct an informational session on this position at the IU Career Development Center (625 N. Jordan Avenue, Bloomington) on Wednesday, January 20, 2016 5:30-7:00PM EST.

Interested applicants should submit resume and cover letter to the [Career Development Center’s MyJobs site](#) by Friday, January 29, 2016 at 11:59PM EST. Cover letter must address the following question: What do you view to be the benefit of having peer programs on college campuses?

*For any questions related to the position, contact the IU Office of Financial Literacy at mnysmrt@iu.edu. Please submit all application materials directly through MyJobs. Do not send any application materials to the Office of Financial Literacy or any individual representing the Team.*