CACG Financial Education Program for the 14-15 Academic Year

Goals for the 14-15 academic year aligned with best practices:

- Hire a full time program coordinator to oversee the daily management and coordination of the financial literacy project. This person will be part of the Student Success team and answer to the Director of Student Success. The responsibilities of the coordinator will be to:
  - Coordinate financial literacy advisory council which currently includes the Director of Financial Aid, Director of Student Success, Director of Trio Student Support Services, faculty members, representatives from student senate, Early Childhood Education Program Assistant. A representative from the Admissions office, Student Accounts manager and the Wellness Coordinator, who is part of the Residence Life staff have agreed to join this year. This council will meet once per block, 8 times a year and once during the summer.
  - Work with all incoming students during the Ready2Rock orientation days for fall and spring semesters. All incoming students receive an advising manual during the orientation sessions. A new section will be developed and added to the manuals with information about financial literacy, the services offered and contact information.
  - Coordinate the ordering and distribution to students of financial literacy education materials. All incoming students receive a Dollars and Sense workbook, an NSLDS Bookmark and Get Money Smarts card during Ready 2 Rock orientation sessions.
  - Work with OCHE staff to coordinate training for faculty and staff about financial literacy.
  - Work with members of the advisory team and the Director of Institutional Research to identify high-risk populations and provide targeted intervention and outreach to these students. The outreach will include letters, phone calls, presentations and individual sessions. The coordinator will work with the ECE program assistant to visit off campus sites and provide education about financial literacy.
  - Provide face to face entrance and exit counseling in coordination with the Financial Aid office.

- Integrate financial literacy into all aspects of the student retention practices.
  - A financial literacy presentation will be included in advising sessions during pre-registration sessions starting this fall. There are 4 sessions per week for the last two months of the semester and all students are encouraged to attend these sessions.
  - Information about how to incorporate financial literacy into advising sessions with students will be developed for faculty advisors.
  - Coordination with The Career Services coordinator to offer workshops on financial literacy, and scholarship writing and searching as part of the Wednesday workshop series.
- A financial literacy class has been developed on the learning management platform, Moodle. Students are enrolled in this class through a number of different referral sources, such as financial aid appeals committee, TRIO first year program, students with high debt in relation to credits earned and by request. This class will continue to be enhanced and added to throughout the year as new resources are identified.
- An email will be sent to all students with detailed information about the Financial Crisis Hotline.
- Business services will give each student a lamented card, “Know what you owe” when they receive their refund check as a means of educating students about the cost of loans.
- Create packets of information for students who are withdrawing from classes which includes information on the cost of withdrawing, how to reapply for classes, student loan repayment, etc.

- Coordination and implementation of the Ever-Fi’s Transit Online Financial Literacy program.
  - For the 14-15 academic year the transit program will be used as an intervention strategy with targeted populations of students.
    - Students with financial aid appeals will be required to complete both the Transit online program as well as the Moodle class before their aid will be re-instated.
    - Targeted letters from the Dean of Students will be sent to currently identified student populations with high debt in relation to credits earned as well as students in the TRIO first year program to complete the online program.
    - Other high risk groups will be identified throughout the semester to receive access to the Transit program.

- The advisory council and coordinator will work with the marketing department at UMWestern to develop a brand as a strategy to increase visibility of the program and resources offered.
  - Possible uses of the brand and marketing strategy include table tents for cafeteria tables, a financial literacy awareness banner, creating posters to hang both on and off campus with information about the resources available, create brochure with information about how academic progress affects your financial aid, etc.
  - Use brand to advertise workshops, and contests, such as spring break on a budget.
Budget Narrative

The University of Montana Western has developed a grant budget to address the following needs for our financial literacy program:

- Hire a 1.0 FTE Financial Literacy Program Coordinator I to replace Meghan Flanary, .5 FTE
- Travel to Early Childhood Education Outreach Sites to provide direct service to identified at-risk, high debt population
- Provide the program coordinator with the technology and supplies needed to accomplish the goals of the grant
- Provide sufficient printing budget to continue to be able to provide useful and timely materials and program/event advertisements to students

In grant year 2013-2014 the campus budgeted for a .5 FTE position. Due to sequestration and the hiring process, the Program Coordinator did not officially start until January. The program coordinator worked nearly full-time for the remainder of the grant year. As a result of the work done during the previous year and the identified projects for the upcoming year, a full-time coordinator is essential to not only sustain the great gains made during the first year but to expand. The remaining budgetary needs above are to continue the best practices that had so much success in year one.
<table>
<thead>
<tr>
<th>Budget Category</th>
<th>Expenditure</th>
<th>Detail</th>
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<tbody>
<tr>
<td>Salary and Wages</td>
<td>$ 23,658.00</td>
<td>Program Coordinator at 1.0 FTE</td>
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<tr>
<td>Benefits</td>
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<td>Expense</td>
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<td>Assessed at 29% for Work Comp, FICA, Annual Leave, Sick Leave etc.</td>
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<td>Insurance</td>
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<td>1.0 FTE Employer Contribution</td>
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<td>Travel</td>
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<td>Travel to ECE sites and MUS Symposium</td>
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<td>Mileage</td>
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<tr>
<td>Lodging</td>
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<tr>
<td>Meals</td>
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<td>Communication</td>
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<td>Phone</td>
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Staff Vacancy Announcement

Financial Literacy Program Coordinator

Department: Student Success
Position: Full Time
Wage: $11.33 an hour
Funding for position dependent upon grant funding. Anticipated funding will be through August 2015.

The University of Montana Western seeks a Financial Literacy Program Coordinator to work with Student Success and the Financial Aid Office. The Financial Literacy Program Coordinator is funded through an Office of the Commissioner of Higher Education (OCHE) College Access Challenge grant and serves as the primary point of contact to oversee the daily management and coordination of this program.

Description

The financial literacy coordinator is responsible for:

- Working with the Financial Literacy Advisory Council to increase financial literacy awareness across campus
- Working to establish a culture of financial literacy awareness across campus
- Identifying at-risk populations using institutional data and coordinate outreach to these students
- Developing and delivering targeted financial literacy curriculum to both on campus and off-site locations
- Working with OCHE staff to coordinate training for advisory board, staff, and faculty
- Identifying opportunities for intervention with entire student population
- Educating students individually and in group settings on financial literacy in accordance with best practices as established by the Montana University System
- Maintaining records of participation in the program as required by UMW and OCHE, complete grant reporting requirements and monitor budget expenditures

REQUIREMENTS

The successful candidate must possess:

- Minimum of an associate degree or have three years of comparable professional experience
- Demonstrated experience in project coordination
- Ability to work well both independently and as part of a team
- Strong presentation skills
- Basic computer skills and
- Working knowledge of Microsoft Office
- Excellent oral and written skills and be able to teach and explain things well.

Candidate must be able to maintain confidential information.

Preferred requirements include a baccalaureate degree, experience with Ellucian BANNER, knowledge of financial literacy best practices and learning management system, such as Moodle.

APPLICATIONS:

Send a State of Montana Application Form along with, a letter of application related to the position description, a resume and names, addresses and phone numbers of at least three (3) current references. For further information about the position, please contact Ilene Cohen by email at ilene.cohen@umwestern.edu or telephone (406)683-7311.
Send your application to:

Dorothy Seymour
The University of Montana Western
710 S Atlantic St
Dillon MT  59725

**The University & Dillon Area**

The University of Montana Western, located in Dillon, Mont., is an innovative institution nestled in a scenic valley in the Rocky Mountains of southwestern Montana. The campus Full-Time Equivalent (FTE) for student enrollment is approximately 1,289. Montana Western has over 60 FTE faculty members, features small cases for all students and has been recognized for excellence by U.S. News and World Report. Montana Western’s small size and focus on education innovation have earned it the reputation of being a place where faculty and staff chose to collegially and creatively make a difference in the education of students. Montana Western is the first and only public four-year college in the nation to use block scheduling in which students take a single class at a time. This immersion learning program facilitates increased opportunities for experiential types of learning.

The mission of the University of Montana Western is to provide innovative interdisciplinary education through experiential learning that combines theory and practice. Montana Western services citizens of all ages with its academic, community service, and lifelong-learning programs. As part of the global community, Montana Western encourages diversity, international awareness, environmental responsibility, and mastery of technology as a gateway to the world.

Dillon, a community of 5,000 people, is known for outstanding public schools, safe environments, recreational opportunities and an excellent quality of life.

*The University of Montana Western is an equal opportunity/affirmative action employer and encourages applications from qualified women, minorities, veterans and people with disabilities. Qualified candidates may request veterans, or disabilities preference in accordance with state law. Reasonable accommodations are provided in the hiring process for persons with disabilities. Finalists for this position will be subject to a criminal background investigation.*