



## **Financial Planning Specialist 2**

Students hired to work in Union & Involvement Services (U&I) are expected to support the mission of the Department. We anticipate that each student will collaborate with customers, faculty/staff, and students to assist with campus activities and organizational services while upholding University community standards. Students are hired and trained to support all the functions of the Department. This position primarily will work on the Organizational Development Team in providing assistance, oversight and support to student organizations. This position will have some team independent functions.

The individual selected to serve in this role can expect to gain direct professional experience through their ability to put financial knowledge into practice. They will serve as a resource for Recognized Student Organizations (RSOs) working to achieve their financial goals. They will also be provided an opportunity to enhance their skill set through real world financial practice.

Students selected for this role will be expected to contribute to the Department's pursuit of providing a superior customer satisfaction experience by supporting the Department's values of Inclusivity, Integrity, Collaboration and Customer Focus. This position will assist with financial matters for U&I and Campus Recreation.

### **Duties and Responsibilities:**

Budget and Billing Tasks: 25%

- Assist U&I Professional Staff with budget recording for all of SUB Budgets and Campus Recreation.
- Work with Financial Specialist 1 to compile monthly billing and back charge reports to submit to the Business Office;
- Assist with the deposits and bookkeeping of Homecoming and Greek Week budgets and/or Philanthropy donations.
- Serve as back up to Financial Specialist 1 and assist with assignments as requested/needed.

Organizational Resource Development and Delivery: 20%

- Work with a team to organize on-campus programming and training - serve as lead on developing any resources related to budgeting, financial management, financial risk, etc.
- Assist with any revisions of printed resource materials;

#### Organizational Compliance: 20%

- Work externally with student organizations and keep them apprised of all U&I and University policies and procedures;
- Assist with the student organization registration process which includes: maintaining the current files for student organizations, performing regular updates to U&I databases, completing follow-up correspondence, and maintaining adequate records. Deactivate organizations not in compliance;

#### RSO Support: 15%

- Serve as a resource to all student organizations on development of Financial Operational Plans/organizational financial best practices.
- Be a resource for students, faculty and staff on all policies pertaining to student organizations;
- Assist with providing support services to organization advisors;

#### Organizational Related Events: 10%

- As a team, facilitate a Voluntary Organizational Interest Meeting approximately three times a year.
- Serve as a support and assist with implementation of organization and advisor related programming. May include, but not limited to: Activities Fair (one in fall and spring), Leaders Recognition Program (implemented by the Leadership Specialist, supported by team), Advisor Appreciation and President's Day.

#### Office Support: 10%

- Assist customers that visit the office;
- Perform other related duties as needed

#### **Qualifications:**

- Minimum Sophomore level status
- Must possess a minimum GPA of 2.75, preference given to applicants with a 3.0 or higher.
- Open to all majors, but preference will be given to Accounting or Business majors
- Trustworthy
- Comfortable with cash handling
- Basic knowledge of how to operate Microsoft Excel, preference will be given to those you know QuickBooks.
- Problem solving and conflict resolution skills
- Be able to communicate appropriately with students, professors, and faculty about charges via email, in person and on the phone.

## Competencies:

*Please list skills in any or all of the following areas. Examples are provided.*

Communication Skills: Utilize effective oral communications when answering questions; Ability to use effective written and oral communication skills when answering questions; Ability to communicate and respond effectively with customers; Communicate with team members and Professional Staff.

Critical/Creative Thinking and Problem Solving: Resolve needs of clients. Ability to resolve needs of customers in an appropriate and professional manner; Provide excellent customer service to clients; Ability to follow cash handling and filing procedures, Have a general sense of campus need; Troubleshoot problems.

Computer: Ability to develop spreadsheets, databases, and word processing documents (i.e. Basic/Advanced knowledge of Word, Publisher, Excel, Power Point, and Google Applications); Willingness to learn online database and internal communication functions; Ability to learn how to use copier read-out functions

Clerical: Ability to develop spreadsheets and word processing documents (i.e. Basic/Advanced knowledge of Word, Excel, and PowerPoint or Google Alternative); Ability to develop bills through appropriate programs

Self-Directed Learning: Be able to multitask; Ability to establish priorities, and proceed without supervision; Ability to work independently; Able to maintain confidentiality and professionalism at all times; Display positive attitude of customer service; Ability to recognize and initiate projects as necessary.

Competence in a Discipline: Strong Financial knowledge in order to develop resources;

Personal/Social: Exhibit positive customer relations skills; Able to maintain confidentiality and professionalism at all times; Display positive attitude of customer service; Actively participate in team projects.

Team Work/Team Leading: Demonstrate the ability to work positively with others; Ability to work as a Team; Work with team members on collaborative projects and work closely with others to achieve self-set and delegated goals;

Multicultural: Have experience working with students and/or organizations with multiple identities and backgrounds; Possess the ability to work with customers in an inclusive manner

To complete your application, you must do the following:

- Submit your TruPositions application
- Submit a copy of your resume to Laura Bates (lbates@truman.edu). Please include a list of relevant courses you have taken and/or experiences that would be applicable to this position.

- Include one financial resource that you believe would be helpful for student organizations. This can be content you have created or are borrowing (you must give appropriate credit if borrowed).

Only applicants who have submitted completed materials will be considered for interviews. Applicants who do not submit all materials will not be considered to have completed their application. Not all candidates will be interviewed. Preference will be given to candidates that fulfill all requirements stated in position description.

**Interview and Verification:**

Review of applications will begin on October 1st. Qualified candidates will be contacted to set up interviews. Not all applicants will be selected for an interview. By submitting your application you are allowing Union and Involvement Services to verify your academic record. The selected student will be paid institutionally or may choose to combine work with scholarship or work-study hours (if available).

**Supervision:**

The intern will be directly supervised by the Professional Staff of the U&I/REC. The Staff will directly oversee and direct the student's work, and will conduct the overall evaluation of the work experience. Students will be supervised and assessed based on learning objectives developed and agreed upon by the intern and the staff.

**Time Requirements:**

The student should expect to work an average of 10-12 hours per week. Work may be adjusted to attend appropriate meetings or events. Students will be required to attend appropriate meetings including, but not limited to weekly team meetings and monthly all staff meetings. Schedule is set based upon student availability.

Truman is an equal employment opportunity, affirmative action employer committed to cultural diversity and compliance with the Americans with Disabilities Act. Truman State University is an equal opportunity institution. For disability accommodation, please contact the Office of Institutional Compliance, Violette Hall 1308, 100 E. Normal, Kirksville, MO 63501 (660) 785-4354 or [titleix@truman.edu](mailto:titleix@truman.edu).