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| **Post Details** | | **Last Updated:** 09/06/2021 | | | |
| **Faculty/Administrative/Service Department** | Student Experience Department, Chief Student Officer Directorate | | | | |
| **Job Title** | Student Money Adviser | | | | |
| **Job Family** | Professional Services | | **Job Level** | 3 | |
| **Responsible to** | Student Advice Manager | | | | |
| **Responsible for (Staff)** | n/a | | | | |
| **Job Purpose Statement**  The Student Money Adviser contributes to providing excellent student support services, aiding the recruitment, retention and progression of all students, and ensuring high levels of student satisfaction.  The post-holder provides support and advice to Surrey students (both UK and International – UG, PG and PGR), throughout their student lifecycle. Areas of responsibility include offering information, advice and guidance around different areas of advice/student life**.** | | | | | |
| **Key Responsibilities** | | | | | |
| 1. Provide a professional, specialist and confidential advice service to students and advise students on their eligibility on a range of subjects including: student financial support, discretionary support funds, bursaries, money management, debt counselling, welfare benefits, tax credits, fee status, and Universal credit. This service is to be provided for students in both further and higher education, and also to potential students interested in applying to University of Surrey. 2. Advise students about the financial implications that may occur of interrupting their study, repeat study, course transfers or withdrawals. 3. Regularly record student contact and case work on relevant databases such as SITS and OneSurrey. 4. Participate in recruitment and enrolment related events (open days) and assist with other activities which underpin the student lifecycle and support the provision of an excellent student experience. 5. Devise and deliver presentations and workshops for both current and potential students on a range of practical, financial, and welfare issues. 6. Support the Student Money Support Team Leader with administration and enquiries related to the University’s scholarships and bursaries scheme. 7. Work in close collaboration with other services within the Student Experience Department to enhance the student experience for both prospective and current students 8. Represent the University to relevant internal/external groups, as a member of relevant professional organisations and undertake other duties across professional services, given the level of the role, as may be requested by the Student Money Support Team Leader, Student Advice Manager, or Head of Student Experience.   **N.B. The above list is not exhaustive.** | | | | | |
| All staff are expected to:  * Positively support equality of opportunity and equity of treatment to colleagues and students in accordance with the University of Surrey Equal Opportunities Policy. * Work to achieve the aims of our Environmental Policy and promote awareness to colleagues and students. * Follow University/departmental policies and working practices in ensuring that no breaches of information security result from their actions. * Ensure they are aware of and abide by all relevant University Regulations and Policies relevant to the role. * Undertake such other duties within the scope of the post as may be requested by your Manager. * Work supportively with colleagues, operating in a collegiate manner at all times.   **Help maintain a safe working environment by:**   * Attending training in Health and Safety requirements as necessary, both on appointment and as changes in duties and techniques demand. * Following local codes of safe working practices and the University of Surrey Health and Safety Policy. | | | | | |
| **Elements of the Role** | | | | | |
| **Planning and Organising**  The Student Money Adviser will work within the Student Money Advice Team to deliver student-centred advice and guidance to both students and staff on a range of financial, and funding issues. Within these parameters the post holder will work with minimum day-to-day supervision and should apply judgement and initiative when managing their workload, including determining short and medium-term priorities, responding to conflicting demands, and managing activity in line with the KPIs of the Department. They will ensure that they meet their agreed objectives, whilst working within established departmental processes and procedures. | | | | | |
| **Problem Solving and Decision Making**  The post holder is responsible for the resolution of routine problems with individual students and liaising with relevant University staff and external bodies. The post holder will be expected to identify the nature of any problems and issues through analysis and then apply their judgement and initiative to find an appropriate resolution. They will communicate with prospective and current students by telephone, email, in person and online providing efficient and effective help to service users. This will include working semi-autonomously at times without close line management supervision, but within the limitations of their training. | | | | | |
| **Continuous Improvement**  The Student Money Adviser will keep up to date with relevant policies and regulations regarding statutory and discretionary student support and other sources of finance and funding, to ensure effective advice and support for students and staff, timely casework administration and contribution to improved process/procedures. As a team, they will use departmental data to understand the effectiveness of their service and be active in seeking feedback from students and staff. | | | | | |
| **Accountability**  The post holder will carry out student money related casework, working in a proactive manner to resolve student queries, referring to colleagues and appropriate advice services where necessary, to achieve an effective result. They will be responsible for meeting students on a one to one basis and will organise their own individual tasks, following team leader requests to meet agreed deadlines as appropriate. | | | | | |
| **Dimensions of the role**  The post holder does not have any budgetary or supervisory responsibility. | | | | | |
| **Supplementary Information**  Student Money Advice provides support to around 17,000 students and disburses over £5 million pounds of student financial support funds, including the administration of University bursary and scholarships schemes, U.S. Federal loans and the University hardship fund. The Student Money Advice Team also support students to be empowered and educated about their own financial health. Student Money Advisers work as part of the Student Experience Department to enhance the student experience at Surrey and to ensure that students receive excellent support and advice and feel a sense of belonging to the University. | | | | | |
| **Person Specification** | | | | | |
| **Qualifications and Professional Memberships** | | | | |  |
| Degree or equivalent  Broad vocational experience, acquired through a combination of job-related vocational training and considerable on-the-job experience in the provision of statutory and discretionary funding related advice, ideally in an educational setting. | | | | | E  E |
| Evidence of training and continuous professional development from a recognised advice sector provider e.g. NASMA, AdviceUK. | | | | | D |
| **Technical Competencies (Experience and Knowledge)** | | | | **Essential/ Desirable** | **Level**  **1-3** |
| Experience of providing information, advice and guidance within a higher education setting (e.g. student fees/funding/debt/financial capability) | | | | E | 2 |
| Experience of supporting individuals with complex regulatory procedures | | | | E | 2 |
| Experience of discretionary fund decision making and identification of current issues. | | | | E | 2 |
| Highly degree of IT capability, including experience of using Microsoft Word, excel, power point and outlook email or similar packages | | | | E | 3 |
| Excellent communication and presentation skills, and the ability to convey complex information with clarity to a range of audiences | | | | E | 2 |
| Excellent advisory skills and the ability to interpret and advise on complex statutory regulations and procedures | | | | E | 2 |
| Experience of dealing with cultural sensitivity issues requiring tact, diplomacy and a calm approach in difficult situations | | | | E | 2 |
| **Core Competencies** | | | | | **Level**  **1-3** |
| Communication  Adaptability / Flexibility  Customer/Client service and support  Planning and Organising  Continuous Improvement  Problem Solving and Decision Making Skills  Managing and Developing Performance  Creative and Analytical Thinking  Influencing, Persuasion and Negotiation Skills  Strategic Thinking & Leadership | | | | | 3  2  3  2  2  1  2  2  1  2  2  1 |
| This Job Purpose reflects the core activities of the post. As the Department/Faculty and the post holder develop, there will inevitably be some changes to the duties for which the post is responsible, and possibly to the emphasis of the post itself. The University expects that the post holder will recognise this and will adopt a flexible approach to work. This could include undertaking relevant training where necessary.  Should significant changes to the Job Purpose become necessary, the post holder will be consulted and the changes reflected in a revised Job Purpose. | | | | | |
| **Organisational/Departmental Information & Key Relationships** | | | | | |
| Background Information  The post holder will be part of the Student Experience Department, within the Chief Student Officer Directorate. The Student Experience Department includes approximately 35 members of staff across a range of student engagement services (Money Support, MySurrey Hive, International Student Support, Student Success, Widening Participation and Outreach, and the Higher Education Outreach Network).  The Chief Student Officer Directorate serves to provide a joined-up and effective service to students across their student journey at the University: from pre-enrolment to graduation, with an excellent student experience as its primary focus. We ensure that students receive excellent support and advice and feel a sense of belonging to the University of Surrey community, and work against the key principles in our student and staff partnership manifesto ([student-staff-partnership-manifesto.pdf (surrey.ac.uk)](https://surrey-content.surrey.ac.uk/sites/default/files/2021-09/staff-student-partnership-manifesto.pdf). The University is also committed to equitable access and participation at University and this post is key to enabling students to feel supported and to be able engage with their studies through times of financial need. | | | | | |
| Department Structure Chart | | | | | |
| Relationships **Internal**  Key staff in:   * Faculties, Schools and Depts. * Student Experience * Wellbeing and Welfare * Employability and Careers * Academic Registry * Accommodation * Doctoral College * Finance * International Study Centre   **External**   * USSU ([University of Surrey Students' Union)](https://www.google.co.uk/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&ved=0ahUKEwjhqt7pxOjWAhUmOsAKHXsRCYYQFggpMAA&url=https%3A%2F%2Fwww.ussu.co.uk%2F&usg=AOvVaw1nGC9eksrkU0s2blS2la58) * Local authorities * Local and National Charities and Advocacy bodies. E.G. The National Network for the Education of Care Leavers (NNECL) * Higher Education Outreach Network   All necessary networks general welfare and advice, such as:   * National Association of Student Money Advisers * The Student Loan Company * The United States Department of Education * The NHS Business Services Authority * The UK Council for International Student Affairs * Citizens Advice, * Shelter, * Job Centre Plus * National Homelessness Advice Service. | | | | | |