

Last Updated: 06/01/2026			
<b>Job Title</b>	Student Money Advice Manager		
<b>Faculty/ Department</b>	Chief Student Officer's Directorate	<b>Legal Entity</b>	University of Surrey
<b>Job Family</b>	Professional Services	<b>Job Level</b>	4
<b>Reports To</b>	Head of Student Hub Operations	<b>Line Manages (role title(s))</b>	Student Money Advisers

### Job Statement

The Student Money Advice Manager 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 manages the Student Money Advice team which provides financial 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, managing the administration and operation of the university's hardship fund and leading on the provision of our digital money service through our partnership with Blackbullion.

### Key Responsibilities This is not designed to be a list of all tasks undertaken but the main responsibilities (5 to 8 maximum)

1. Manage 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, money management, fee status, and benefit eligibility where appropriate. This service is to be provided for current students and to potential students interested in applying to the University of Surrey.
2. Maintain oversight of student contact and case work on relevant databases such as SITS, Blackbullion, and OneSurrey, always ensuring accuracy of information. Manage associated risks involved with any case work undertaken by the team.
3. Utilise departmental data from OneSurrey and other sources collected by the team, as well student feedback, to understand and ensure the effectiveness of the service provided, recommending and implementing improvements as required. Use data from multiple streams to report and track progress against departmental KPIs and operational objectives.
4. Ensure that information regarding student finance, and other money-related topics, is delivered to students in an effective way through a range of techniques, including leading on the university's targeted communications centred around finances.
5. Work in close collaboration with other services within the University to enhance the student experience for both prospective and current students. This includes participating in recruitment and welcome events and supporting other activities delivered by Student Experience and the CSO, all of which underpin the student lifecycle and support the provision of an excellent student experience.
6. Ensure that the University's and external policies and procedures are practiced by the team and keep abreast of any policy changes or changes to regulation that affect the advice provided by the Student Money Advice, as guided by the Head of Student Hub Operations.
7. Oversee the disbursement of the University's hardship funds and emergency loans across the Student Money Advice Team, ensuring that the team information is accurate and that recipients receive their agreed funding in a timely manner.
8. Lead on the provision of Surrey's online financial education provision and hardship fund administration through our partnership with Blackbullion.

### **N.B. The above list is not exhaustive.**

### Role Scope and Impact This is a summary of the post holder's role in delivering outcomes, making decisions, and the complexity of problem-solving involved in the role.

1. Accountability: Describe level of autonomy and decision making

Under the guidance of the Head of Student Hub Operations, the Student Money Advice Manager will lead on the day-to-day management and coordination of the Student Money Advice Team. They will be expected to work without significant supervision, referring to experienced colleagues across the CSO where necessary and will know when to escalate complex enquiries. The post holder supervises the Student Money Advice team, coordinates casework, and ensures compliance with university policies and external regulations.

The post holder will carry out complex 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. Their team will be responsible for meeting students on a one-to-one basis, and they will organise their own individual tasks, whilst ensuring that the team meet agreed deadlines as appropriate.

2. Problem solving: *Describe complexity and nature of problems handled.*

The post-holder is expected to provide advice and solutions to routine day-to-day problems within the specialist area in which they are familiar. Resolution for these issues will usually be found through referring to their previous experience of similar problems, through consultation with colleagues or professional contacts, or through referring to departmental policies and procedures and applying them.

The post holder is expected to use initiative and judgement to address and resolve more complicated problems and issues, referring only the most complex or those issues outside of the remit of their role to their line manager. The post-holder is, however, expected to have a degree of involvement in finding and implementing resolutions in this case.

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.

**Supplementary Information**

The post-holder will be expected to contribute to University Welcome events in late September and annual leave should not be taken between mid-September and mid-October.

The post-holder will be expected to contribute to University Open days, which are scheduled regularly in advance.

The post-holder will be responsible for informing the Associate Director Student Experience about delivery provision to inform any purchases against the allocated budget.

**Person Specification** This section describes the knowledge, experience & competence required by the post holder that is necessary for standard acceptable performance in carrying out this role.

**Qualifications and Professional Memberships**

Degree, HND, NVQ 4 qualified or equivalent in relevant subject/relevant formal training, plus a number of years' experience in similar or related roles.	E
Or: Significant vocational experience , demonstrating development through involvement in a series of progressively more demanding relevant work/roles, and the acquisition of appropriate professional or specialist knowledge	

Evidence of training and continuous professional development from a recognised advice sector provider e.g. NASMA, AdviceUK.	D
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<b>Technical Competencies (Experience and Knowledge)</b> This section contains the level of competency required to carry out the role (please refer to the Competency Framework for clarification where needed and the Job Matching Guidance).	<b>Essential/Desirable</b>	<b>Level 1-3</b>
Level 1: basic level of understanding/experience and can apply it with guidance.		
Level 2: good level of understanding/experience and can apply it with little or no guidance.		
Level 3: expert level of understanding/experience and can apply, develop it and guide others.		
Experience of providing information, advice and guidance within a higher education setting	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
<b>Special Requirements</b> This may include a Disclosure and Barring Service (DBS) check, regular overseas travel, driving licence, shift work.	<b>Essential/Desirable</b>	
Commitment and ability to work collaboratively across team and organisational boundaries, developing relevant skills and knowledge.	E	

Experience of providing student/staff advice in a similar or related role, preferably in Higher Education.	E
<b>Core Competencies</b> This section contains the level of competency required to carry out this role. (Please refer to the competency framework for clarification where needed). n/a (not applicable) should be placed, where the competency is not a requirement of the grade.	<b>Level 1-3</b>
Communication	3
Adaptability and Flexibility	3
Customer, Client service and support	3
Planning and Organising	2
Continuous Improvement	2
Problem Solving and Decision Making Skills	2
Managing and Developing Performance	3
Creative and Analytical Thinking	3
Influencing, Persuasion and Negotiation Skills	3
Strategic Thinking and Leadership	2

This Job Purpose outlines the core activities of the role. As the Department/Faculty and the post holder evolve, the duties and focus of the role may change. The University expects the post holder to adopt a flexible approach to work, including undertaking relevant training when necessary. If significant changes to the Job Purpose are required, the post holder will be consulted, and the changes will be reflected in a revised Job Purpose.

**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.
- Contribute towards broader university initiatives that have a positive impact on student experience, recruitment and campus operations. This may include participation in cross-functional activities such as open days, confirmation and clearing, welcome week, graduation.
- 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:**

- All staff have a statutory responsibility to take reasonable care of themselves and others and to prevent harm by their acts or omissions. All staff are, therefore, required to adhere to the University's Our Safety Policy Statement and associated Procedures.

## Organisational/Departmental Information & Key Relationships

### Background Information

**Student Money Advice** provides financial support and advice to around 17,000 students and disburses the hardship fund. The Student Money Advice Team also supports 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.

The post holder will be part of the Student Experience Department, within the Chief Student Officer's Directorate. The Student Experience Department includes a range of student engagement services (Student Money Advice, MySurrey Hive, International Student Advice, MySurrey Case Coordinators, Events & Communities, Religious Life & Belief). The Student Experience Department focuses on delivering a personalised and welcoming experience in all our engagements, putting students at the heart of our work, and fostering a sense of belonging and community ethos through all our practices.

The Chief Student Officer's 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. 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** Please highlight the post holder's role by right clicking and selecting format shape, selecting solid fill and 2<sup>nd</sup> shade of blue in list. Boxes can be added/removed by right-clicking and selecting add shape or cut. Font should be Frutiger LT Std 45 Light (max font size 10\*).

