

<b>Last Updated: 22/04/2026</b>			
<b>Job Title</b>	Student Financial Success Officer		
<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>	3
<b>Reports To</b>	Student Money Advice Manager	<b>Line Manages (role title(s))</b>	N/A

**Job Statement**

The Student Financial Success Officer will support a proactive model of financial education that complements existing hardship and money advice services, helping students to build confidence and capability in managing their finances throughout their studies. The post holder will design and deliver a proactive programme of financial education and targeted support that enables students to manage money confidently, reduces the impact of financial stress on learning and wellbeing, and improves continuation and graduate outcomes. Working across Student Experience, Student Success, and related services, the post holder will provide expert, visible advice on bursaries, scholarships and financial capability, using data to identify and support students most at risk of hardship. Delivery will be from applicant stage through to graduation, allowing care throughout the course of the whole student lifecycle. In doing so, the role will enhance the student and staff experience, advance equality of opportunity, and contribute directly to institutional priorities and Access and Participation Plan targets by improving engagement, success, and the effective use of university funds.

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

1. Design, deliver, and evaluate a structured programme of financial capability education, including workshops, curriculum sessions, and digital resources.
2. Manage a small programme budget to support the activities delivered by the post holder.
3. Provide expert, accessible advice and guidance on bursaries, scholarships, and wider student funding and money management.
4. Act as a point of contact for scholarship and bursary recipients, providing support, guidance and advocacy to help students overcome barriers they may face while studying and achieve success throughout their time at university.
5. Use data and insight to identify students at higher risk of financial difficulty and coordinate targeted, timely interventions.
6. Work collaboratively with Student Success, Student Experience, Wellbeing, Careers and academic teams to embed financial education across programmes and transition activities.
7. Monitor, analyse, and report on engagement, outcomes, and impact to inform institutional strategy, including Access and Participation Plan priorities.
8. Champion equality, diversity and inclusion within financial support, ensuring approaches are inclusive and responsive to structurally disadvantaged student groups.

**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.

**Accountability**

The post holder is expected to provide advice and solutions to routine day-to-day problems and issues within their specialist area of student financial capability and success, drawing on good professional practice, established departmental processes, and professional support and guidance from more senior members of the relevant teams. They are expected to exercise sound judgement, demonstrate initiative, and make recommendations for improvements, where appropriate, to ensure that Student Experience and Student Success & EDI activities, events, and financial education initiatives are implemented and maintained effectively. The post holder is expected to refer complex or high-risk issues, which fall outside the remit of their role, to their line manager for guidance.

**Problem Solving**

The post holder, under the guidance of their manager, will contribute to the delivery of agreed University objectives relating to student financial capability, wellbeing and success, working within established departmental processes and procedures. Within these parameters, the post holder will work with minimal day-to-day supervision to plan and deliver agreed activities and initiatives. They will be expected to apply sound judgement and initiative in managing their workload, including setting medium-term priorities, responding to conflicting demands, and adjusting plans in response to emerging student needs and data insights.

**Supplementary Information**

This post is funded by donor sponsorship and is therefore subject to additional requirements relating to stewardship and reporting. The post holder will be expected to provide regular, appropriate feedback on the activities, outcomes, and impact of the work to the sponsoring donor, in line with agreed reporting cycles and standards. This activity will be overseen and supported by colleagues in the University's Advancement team, and the post holder will be required to engage with relevant Advancement processes and activities, including contributing to case studies, impact reporting, and occasional donor-focused events or communications, as required.

To enable the above activity, the post holder will be required to engage in monthly 1:1 meetings with a member of the Advancement Office to ensure that these requirements are being met. The member of the Advancement Office will provide informal support in these areas as required, and support the post holder in a 'dotted-line' capacity.

The post holder is required to support and contribute to the delivery of the Student Experience frontline services, including attendance at events such as Open Days, Ceremonies and Corporate events as required.

The post holder may be required to show flexibility in working outside of core office hours on occasions.

**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.

<b>Qualifications and Professional Memberships</b>		
HNC, A Level, NVQ 3, HND level or equivalent, plus several years relevant experience		E
OR		
Broad vocational experience, acquired through a combination of on-the-job experience, demonstrating development through involvement in a series of progressively more demanding relevant work/role		
Membership of relevant professional bodies related to Widening Participation. E.g. HELOA, NEON, etc.		D
Evidence of training and continuous professional development from a recognised advice sector provider E.g. NASMA, AdviceUK.		D
<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). 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.	<b>Essential/ Desirable</b>	<b>Level 1-3</b>
Excellent communication and presentation skills, and the ability to convey complex information with clarity to a range of audiences.	E	3
Competent degree of IT capability, including experience of using Microsoft Word, excel, power point and outlook email or similar packages.	E	3
Good knowledge of higher, further and secondary education sectors.	E	2
Experience of organising, administering and delivering events/initiatives.	E	2
Experience of collecting, collating and organising data in preparation for monitoring and reporting.	E	2
Experience of providing information, advice and guidance within a higher education, or charity / public sector setting (e.g. student fees/funding/debt/financial capability).	E	2
Excellent collaboration and organisational skills, including the ability to engage in self-directed learning.	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>
Ability to work outside contracted hours at Open Days & attend training/conferences as required.		E

The post-holder will be expected to contribute to Welcome events in late September and annual leave should not be taken between mid-September and mid-October.	E
Must be willing to undertake a DBS disclosure check. Satisfactory clearance is a prerequisite for this role.	E
<b>Core Competencies</b> This section contains the level of competency required to carry out this role.	<b>Level 1-3</b>
Communication	3
Adaptability and Flexibility	2
Customer, Client service and support	2
Planning and Organising	2
Continuous Improvement	2
Problem Solving and Decision Making Skills	2
Managing and Developing Performance	n/a
Creative and Analytical Thinking	2
Influencing, Persuasion and Negotiation Skills	2
Strategic Thinking and Leadership	n/a
<p>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.</p> <p><b>All staff are expected to:</b></p> <ul style="list-style-type: none"> <li>Positively support equality of opportunity and equity of treatment to colleagues and students in accordance with the University of Surrey Equal Opportunities Policy.</li> <li>Work to achieve the aims of our Environmental Policy and promote awareness to colleagues and students.</li> <li>Follow University/departmental policies and working practices in ensuring that no breaches of information security result from their actions.</li> <li>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.</li> <li>Ensure they are aware of and abide by all relevant University Regulations and Policies relevant to the role.</li> <li>Undertake such other duties within the scope of the post as may be requested by your Manager.</li> <li>Work supportively with colleagues, operating in a collegiate manner at all times.</li> </ul> <p><b>Help maintain a safe working environment by:</b></p> <ul style="list-style-type: none"> <li>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.</li> </ul>	
<b>Organisational/Departmental Information &amp; Key Relationships</b>	

### **Background Information**

This role will form part of the Chief Student Officer's Directorate (CSO). The CSO 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.

### **Relationships**

This is not an exhaustive list of every relationship the post holder has, but is a brief description of those that play an important part in the post holder successfully carrying out the role.

#### **Internal**

Key staff in:

- Faculties, Schools and Depts
- Advancement teams
- Departments across the CSO
- Estates Facilities and Catering Service
- Surrey Sports Park

#### **External**

- University of Surrey Student's Union
- Relevant charities and advocacy groups
- The OfS
- Professional Networks related to widening participation
- Professional Networks related to Money Advice
- Blackbullion
- The Student Loan Company

### **Department Structure Chart**

