

Role Profile

Role title:	Senior Financial Advisor
Salary:	£30,450 - £33,600
Full/Part Time:	Full-Time
Contract term:	3 Year Fixed-Term
Accountable to:	Associate Director of Student Engagement
Accountable for:	2 x Student Staff (10 hours per week each)
Hours:	35 Hours per Week
Location:	Usually located at the main Students' Union Building / with an option to work some hours remotely. There is normally a requirement for office-based working at least 3 days per week to ensure service needs are met. Up to 5 days a week office working may be required during busy periods or to cover short staffing. The option for remote working is subject to change dependent on business need. Occasional duties being delivered across the University campus or in the local community.
Eligibility:	Open to applicants with relevant skills and experience who are eligible to work in the UK at the start of employment.
Rewards Package:	We offer a great rewards package. You can see it here .

Our Organisation

We are Manchester Students' Union, the biggest SU in the country, supporting over 40,000 students throughout their time at university. We help to make student life the best it can be by supporting students to campaign for change, creating opportunities to meet new people, providing employment opportunities, providing advice and support and being a safe place on campus.

We are a values-centred organisation that employs around 90 permanent, full-time members of staff. We recruit a wide range of roles throughout the year within all our departments from our Commercial team operating Manchester Academy Venues, 13 Media, Bar 532 & Kitchen and Corridor Coffee to our Student Activities, Student Engagement, Marketing and Communications, Finance, HR and Facilities teams. Our team of around 400 part-time, studying staff are instrumental in providing to support to all departments as well as leading major projects like Student Angels. When you join UMSU, you'll be immersed in an environment that empowers staff to make great things happen and we're always on the lookout for innovative, passionate, and proactive people to join us.

Our staff team is led by our senior leadership team who are instrumental in driving our strategy at UMSU. It's made up of our CEO, COO, 3 Directors and 2 Associate Directors. We are governed by our trustees and Exec Officers, you can find out more about that [here](#). All our permanent, full-time roles are graded (Grade A-E) which means that there is a clear path to your development and progression whilst at UMSU.

Our Organisational Values

Our values are really important to us and shape the work that we do every day. As part of our recruitment process, we want you to demonstrate how your experiences, behaviours and skills align with our values.

Our values are

- We put students at the heart of what we do
- We provide a 'great experience' service
- We believe in improvement and progression
- We are a community
- We are open and transparent
- We are inclusive

You can find more detailed explanations of our values on [our website](#).

Role Overview

The Senior Financial Advisor is a new 3 year post funded by the University of Manchester, responsible for developing and delivering a dedicated financial advice offer within the Students' Union Advice Service. Financial advice is provided across our advice staff but in this role, you would take the lead in delivering this service. In 2023-24, financial advice made up 23% of the Advice caseload with questions on financial support options and additional funding being the biggest area of concern for students. The role is aimed at meeting the current gap in university support services and as well as bringing additional capacity into the Advice Service. The role is key in delivering on our strategic theme that students feel well supported, as statistics show money is a big area of concern for students.

A key part of the role will be mapping out the Service's current offer, reviewing and improving this, as well as expanding on it. You'll define what the offer looks like and how the advice is delivered. You'll be able to respond to the financial enquiries we currently receive, as well as expanding our offer into financial literacy, budgeting and debt advice.

You'll support students to get in control of their money, access the financial support they are entitled to and understand and pursue their debt options. You'll develop a one stop shop for students to access advice on a wider range of financial issues ensuring we're providing a great experience service and demonstrating that we are a community, offering support in a key area of concern for students. You'll bring specialist knowledge in money advice and be able to support students on a wide range of enquiries. You'll also be able to provide advice on student finance eligibility, student finance hardship process, student finance compelling personal reasons, financial support options within the Union and University, maximising income, external financial support options, financial literacy and budgeting and dealing with debt. Training will be given on specific areas where needed.

To enable the expansion into debt advice, you'll complete registration with the Financial Conduct Authority (FCA). You'll ensure continuing compliance with FCA, Money and Pensions Service and other relevant industry standards. You will initially be responsible for taking on debt casework but will also set up a plan for the other advisors in the team to train in this area and support the delivery of this work. The plan will need to include how the advisors can continue to deliver the expanded service offer once the role comes to an end after 3 years.

You'll look at the best ways to deliver advice and part of the role will focus on how we support students to access the University's Cost of Living Support Fund. Students tell us that it isn't easy to apply to the Fund, it's not widely known about, and it can be difficult to secure an award. You'll deliver a service that addresses these issues, offering dedicated appointment slots where students can access advice and support to complete their application. You'll contribute to a growth in the number of applications. You'll also work with the University Funding Team to build a relationship and gather data and insight to help us influence positive changes.

You'll ensure that the advice and support available is communicated to students. You'll manage 2 student staff posts who will be there to speak to students in campus spaces and raise awareness. They'll talk to students about the Service and financial support available and refer students to you. They'll also communicate the offer to the wider student population. You'll create and recruit the student staff role and provide leadership and support to enable them to fulfil this role. You'll ensure that through this work we are putting students at the heart of what we do.

Another area in which you'll contribute to the strategic theme that students feel well supported is by building strong relationships with stakeholders relevant for a financial advice offer. These include colleagues and services within the Union and our Officer team, the University and externally. Strong relationships will mean we have effective signposting and referral pathways, opportunities for new collaborative work and networks to influence wider positive change for students. Success here will ensure the Advice Service is part of a community and students have access to this as well.

Key Result Areas

Responsible for	Contributor to
You'll complete the application process for authorisation with the Financial Conduct Authority, enabling to service to provide debt advice. You'll ensure continuing compliance with this and other industry standards (Money and Pensions Service). This will result in a great experience service for students having a one stop shop for a wider range of money advice on campus.	You'll support the management of the Advice Service, contributing to improvements to policy, process, systems and operation, ensuring we are always striving for constant improvement and progression.
You'll create, recruit, and line manage 2 student staff roles to raise awareness of the financial advice on offer. Through supporting and coaching your staff to succeed in their roles you'll increase the number of students accessing financial advice with the service by 5%.	Gathering data and insight on students experience of money issues. You'll use data and insight to embed new ways of working so that we're always improving the service. We'll using data and insight to influence stakeholders and create positive change for students so that they feel well supported.
You'll improve students access to the Cost-of-Living Support Fund by offering dedicated appointments to help them with their applications. You'll reduce barriers and grow the number of applications made. This will ensure a great service experience for students.	You'll bring senior technical expertise to the service through developing and maintaining an excellent working knowledge of debt and money advice and taking a proactive approach to continuing professional development.
You'll build a relationship with the University funding team to seek new collaborative ways of	You'll contribute to the improvement and progression of the service by regularly reviewing

working and opportunities to influencing positive change to the financial support offered.	and updating internal (e-mail templates) and external facing resources (website).
You'll review, update and deliver a dedicated financial advice offer to students. You'll bring improvement and progression to the service, ensure a great experience service for students and directly contribute to our strategic goal that students feel well supported.	As an Advice team we'll all actively role model the Union behaviours embedding these across service operation particularly reviewing working practices through an accessible first lens, factoring diverse voices into decision making and actively seeking ways to ensure the service is inclusive for all.
You'll independently manage your casework, responding to e-mail enquiries and offering appointments with students. You'll reply to e-mails to within a 2-5 working days and aim to reduce response times across the academic year.	You'll build and maintain relationships within the Students' Union, with the University and externally, to create effective signposting and referral pathways, seek new collaborative work and opportunities and use these networks to influence wider positive change for students.
You'll ensure that you're providing consistently high quality advice, adhering to service policy and procedure as demonstrated through the results of our monthly quality assurance process. You'll achieve improvement and progression for the service and provide a great experience service for students.	You'll put students at the heart of our service by developing strong relationships with our officers, bringing their ideas into our work and finding ways to collaborate to bring about positive change for students.
You'll create a project plan for advisors to train and deliver advice in financial literacy, budgeting and debt and take over your work when the role comes to an end. This will achieve long term improvement and progression for the service ensuring students can continue to access a wider range of money advice.	

Organisational Stewardship & Leadership Responsibilities

- You'll contribute to departmental planning processes and hold teams accountable for performance against key goals and indicators
- You'll understand key risks for area of work and ensure risk assessments are conducted against relevant activities
- You'll assist and support staff in assisting in key students' union events & activities throughout the year including Welcome week, elections and supporting the officers in delivering their plans
- You'll lead teams acting as an exemplar of the Union behaviours ensuring all staff are given appropriate support in line with the Union management framework and teams are consistently held accountable for delivering against expected performance standards (both role performance and behaviours)
- You'll ensure that teams activities are delivered in line with budget envelope and ensure any risks to financial targets are highlighted. Contribute to the forecasting & budgeting exercises in line with the organisational framework
- You'll hold good working knowledge of policy and procedure as it relates to the team's function, ensure that the team is knowledgeable in the policy and procedure that affects them and provide guidance to staff on application of the policy framework
- You'll proactively contribute to maintaining the communal spaces and ensuring whole team share responsibility for managing team stores and keeping areas clean and tidy

Person Specification

Criteria	Assessed at:			
	Application Form	Interview	Interview Task	All
Education				
We accept candidates from any educational background.				
Skills				
Communication – can analyse and understand complex information (legislation, regulation, policy etc) to apply in practice and to communicate to diverse audiences in a clear and simplified way, tailoring to the recipient.	✓			✓
Growth mindset – proactive approach to continuing professional development, willingness to constantly improve, engage in training, ask questions, being curious, looks for ways to improve processes.		✓		
Networking – great at building new positive working relationships as well as retaining current ones with internal and external stakeholders.		✓		
Organisation – great at planning ahead, prioritising workload, completing admin duties like emailing, and answering the phone.		✓		
Experience/Knowledge				
Experience of providing money advice, information and guidance, and / or casework and adhering to industry money advice standards.	✓			✓
Leadership – able to motivate and inspire a team, confident in setting goals/objectives, enables a team to work autonomously, creating psychological safety within team, building trust, supporting team wellbeing, setting boundaries.	✓			
Operations – stays up to date with best practise and legislation changes, creatively develops operational processes.		✓		

Crisis management and safeguarding – has knowledge and experience of safeguarding and supporting individuals in crisis or who are additionally vulnerable and can apply these principles in practice to safeguard service users.	✓			
Risk management – great at assessing risk, able to consider how to mitigate risks independently, confident in making decisions based on risk assessments.			✓	
Personal Attributes				
Independent / problem solver – great at working with autonomy, using initiative, thinking outside the box and not afraid to try new ideas.	✓			✓
Adaptive – great at managing change, flexible to differing team members needs/ways of working, confident at managing taking on busy periods.			✓	
Values & Behaviours				
Align with the SU's values and behaviours both personally and professionally.	✓	✓		✓
Customer Service – provides a high standard of customer service, creating a welcoming space for all, continually seeks ways to improve services.		✓		

Our Recruitment Process

The way that we recruit is designed to be fair, transparent, and inclusive as well as being an enjoyable experience for everyone involved. You should expect to receive great communication and a warm, welcoming experience.

Every member of staff is recruited the same way, by submitting an application form and attending an interview. We use a recruitment platform called StaffSavvy where you'll submit your application and book interviews, if successful.

Our process allows you to show us your authentic self, gives you a platform to display your skills and knowledge in relaxed and welcoming setting. We'll never put you under any necessary pressure on you, ask you trick questions or interrogate you in an interview and we'll support you all the way through our process.

You can find more information about our recruitment process on [our website](#).