



Money Advisor

Applicant Information Pack



Alternative formats

If you require this document in an alternative format, such as large print or a white or coloured background, please contact our Communications team.



unitedwelsh.com/contact



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About Us

United Welsh is an award-winning not-for-profit organisation providing homes and related services in South Wales. We are passionate about building homes, creating communities and transforming lives.

We look after over **6,300 homes** for people across **11 local authority areas**, and our services help thousands more in our communities.

Helping people to live happily and in good health is important to us, and we are proud to have been named fifth best landlord in the UK.

We have a new building programme that is worth around **£35m** each year and in the next five years, we intend to build **1,300 more homes**. We are ambitious about how we can help people to live their best lives, working

with a range of partners including local and national government and the NHS to give people choice; tackling poverty, improving wellbeing and playing our part in ending homelessness.

The United Welsh Group also incorporates our subsidiary Celtic Horizons Ltd which, in partnership, looks after all our property services, and Harmoni Homes Ltd, which builds affordable homes and homes for sale.

We are also developing a new social enterprise, Celtic Offsite, that will manufacture low carbon homes and support the local economy to thrive.

With almost **400 employees** and a turnover of over **£40m**, we are an ambitious organisation with a strong sense of social purpose.

Life at United Welsh centres around our culture. We live by our values which connect us and inspire us, guiding our strategies as well as the decisions we make day to day.



About Us

United Welsh

**Celtic Horizons
Ltd**

**Harmoni
Homes Ltd**

Developing homes for
United Welsh

**Celtic
Horizons**

Asset
Management

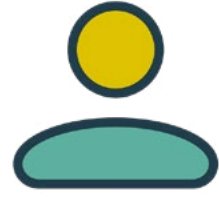
**Celtic
Offsite**

Timber frame
factory

The Celtic Horizons asset management service for United Welsh is delivered in partnership with Mears Ltd



Job Profile



Money Advisor

Reporting to

Money Advice Team Leader

Broad purpose of the post

We have an opportunity to join our Income and Money Advice team as a Money Advisor. The team helps residents with any money problems they're experiencing, providing advice on budgeting, prioritising debt, understanding entitlements and lots more.

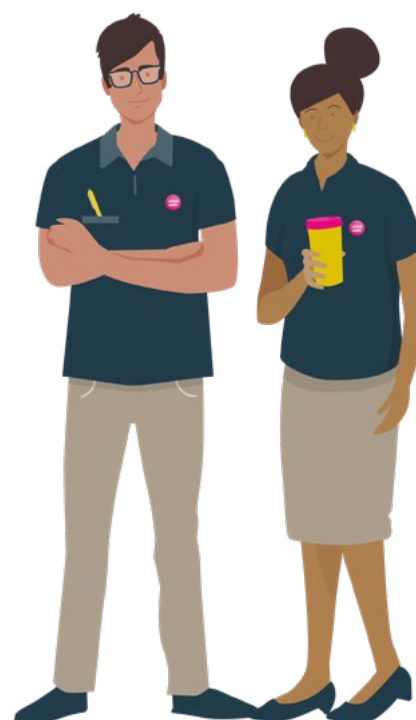
Working with six other Money Advisors, you'll provide a comprehensive welfare benefit, money and debt advice service to residents and their families. This often involves using your creativity and initiative to reach a positive outcome led by the resident.

- Full time, 35 hours
- Permanent
- £36,844.08 per annum
- Closes Tuesday 2nd July, 9am
- Interviews 8th/9th July

Key Accountabilities



- To deliver a specialist advice service to residents, fulfilling our commitment to provide affordable homes where people are supported to sustain their tenancies
- To proactively work with residents, colleagues and external partners to improve benefit uptake and minimise the risks associated with welfare reforms
- To collate and maintain financial and statistical information
- To contribute to the development and implementation of relevant policies, procedures and initiatives
- To establish and maintain effective working relationships with internal and external partners
- To actively promote the work and services offered by the Money Advice team
- To be an effective member of the team and continually seek to improve and develop your own skills and knowledge and the performance of the team.



Personal Requirements

Experience

Essential

- Experience of providing welfare benefit and money advice
- Experience of working with people from different backgrounds and with different needs
- Experience of working in social housing or a related sector

Desirable

- Experience of providing debt advice with IMA Accreditation or a willingness to train and work towards this qualification

IT skills

Essential

- Competent using all Microsoft Office packages
- Be able to input and maintain case notes onto a Case Management System

Desirable

- Experience using IBS Housing Management system and AdvicePro

Requirements within the essential criteria of the Personal Requirements will be used for shortlisting purposes. However, all of the criteria will be considered in the process of making an appointment.

Technical and professional skills

Essential

- Current knowledge of welfare rights and welfare benefit legislation
- Current knowledge of housing policy
- Excellent numeracy and literacy skills
- Excellent communication skills
- Commitment to the delivery of exceptional customer service
- Ability to plan and prioritise own workload
- Ability to remain calm whilst under pressure
- Ability to work flexibly in a challenging and changing environment
- Ability to remain calm while effectively dealing with unpredictable situations
- Ability to make reasoned judgements and decisions
- Understanding of the relationship between customers' income maximisation and the sustainability of United Welsh's rental income stream
- Full clean driving license

Desirable

- Welfare Rights or Money Advice qualification
- Housing Policy or similar qualification

Terms and Conditions

Current Salary

Total salary is **£36,844.08** per annum.

Pension Plus

While working at United Welsh you are eligible to join our pension scheme. United Welsh partner with the **Social Housing Pension Scheme (SHPS)** to deliver our pension provision for employees.

The **Defined Contribution Scheme (DC)** matches employee contributions up to 10%. It is a salary sacrifice scheme, so deductions are taken before tax.

Leave

- **30** days plus Bank Holidays
- **Two** United Welsh Gifted Days - an additional two gifted days, usually to be taken during the office closure over the festive period.

Additional Benefits

- **30 days** annual leave and bank holidays
- An additional **two gifted days** to be taken over the seasonal period.
- A company culture that promotes **work life balance**
- **Flexible** working
- Opportunities to be involved in **'Can Do'** days, giving back to the communities where we work
- A half a day's leave under the **'School Starter Scheme'**
- Free **fruit, fresh filtered water, tea and coffee** within our offices
- **Cycle to Work** Scheme
- One year's **paid subscription to professional body** (one membership per year)
- **Free eye tests** at Specsavers and a contribution towards the cost of prescription glasses
- Access to our **internal coaching and wellbeing services** that are devoted to supporting professional and personal development
- Free and confidential access to a **24/7 Employee Assistance Wellbeing Hub**
- We are a member of the **Social Housing Pension Scheme**. There is an opportunity for employees to join The Defined Contribution Scheme and we match contributions up to 10%
- **Learning and Development opportunities**, with learning available in a range of formats to suit your needs
- As a testament to our approach and genuine commitment to learning, United Welsh holds the **Investors in People - Gold Award**
- We are committed to supporting applicants and staff with disabilities and hold the **Disability Confident Level 1 Award**
- We are committed to becoming a **menopause friendly employer**
- We are an Armed Forces friendly organisation and hold the **Armed Forces Covenant – Bronze Award**



How to apply

To apply, please send a copy of your **CV and cover letter** to jobs@unitedwelsh.com. In the cover letter, please outline why you believe you would be successful in this role based on your experience and on the essential/desirable criteria in the job description, in no more than 500 words.

In addition to your CV and cover letter, please also complete our online Equality, Diversity and Declaration of Interest form which can be found on our website [here](#). If you do not complete all parts of this process, you will be at risk of your application not being progressed further.

Closes: Tuesday 2nd July, 9am
Interview date: 8th/9th July

We do reserve the right to close this role early if we receive a high volume of suitable applications.

Within your CV, please provide the names, positions, organisations and contact details for two referees, one of whom should be your current or most recent employer. We will not approach these referees prior to the shortlist stage, and we will seek your permission first. However, references will be sought as part of our pre-employment checks for the successful candidate.

- We would be grateful if you could submit the Equality Diversity and Declaration of Interest form with your application. You can complete this form online. The information you provide will be used for monitoring purposes only and will be kept separate from your application
- Please ensure your CV and other documents are emailed as a Word or PDF file, as unfortunately, we are currently unable to accept applications in any other formats at the moment
- Requirements within the essential criteria of the Personal Requirements will be used for shortlisting purposes. However, all the criteria will be considered in the process of making an appointment.



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