MONEY MATTERS OUTREACH CO-ORDINATOR

Job Description and Person Specification April 2025

The Wrekin Housing Group



The Wrekin Housing Group

Money Matters Outreach Co-Ordinator

Responsible To: Financial Inclusion Manager

Key Objectives:

- To be the face of our Money Matters service at community, partnership and outreach events, including our local offices and hubs, engaging with customers to ensure they can access the support and advice they need to live well in their homes and sustain their tenancy.
- To support the promotion of our money advice services across our Locality Teams and customers of The Wrekin Housing Group
- To provide low level first point of contact advice on welfare benefit matters, energy advice and crisis support
- To work collaboratively with our Social Value Team to improve customer access to digital & employability support and other training opportunities.
- To engage and build relationships with key external providers, community & support groups to raise awareness of our advice and support services, and create referral pathways.
- Assist in the development of self-help information and guidance for new customers, in collaboration with our Marketing/Housing Teams.
- Proactively promote support services to new tenants, providing low-level first point of contact advice for those in need of essential household items, furniture and flooring
- Assist in the development of our post-merger approach to financial literacy and health.

Key Responsibilities:

- Represent the wider MM Team at local outreach, hubs and community events
- Support the development and implementation of proactive campaigns, ensuring our services and advice are reaching relevant customer groups, and to deliver proactive responses to legislative change.
- Work with Marketing to regularly promote MM services to improve our online presence
- Regular liaison with Locality Teams, to ensure MM support is firmly embedded in their offer to customers
- Support customers to carry out basic benefit entitlement checks using software packages, and complete income & expenditure checks, making referrals into Money Matters as required.
- Provide basic energy-efficiency-related information and advice where applicable to help maximise income by reducing energy costs, referring into specialist Energy Advice where required.
- Collaborate with Employability and Digital inclusion services to help promote and link customers to training and upskilling opportunities and improved digital access.
- Work closely with local Credit Unions to raise customer awareness of their services and support them to engage closer with our communities
- Engage with key partners to raise awareness of advice and support services, to create referral pathways into money advice and employability support
- Connect with local support services and charitable grant opportunities across all of the areas we work, ensuring we have an up-to-date directory for advice teams and customers to access
- Assist in the development of our post merger approach to financial literacy and health.



New Tenants:

- Work collaboratively with our Customer Voice & Value Team to engage involved residents in shaping the support and advice on offer to new customers
- Support the development of self-help information, empowering customers with clear guidance and support to set up their new home to include information on reporting change of circumstances, setting up utility accounts, social tariffs etc.
- Promote the help available to new customers, including money advice, home contents insurance, Reviive discounts, Housing Perks etc.
- Provide low-level case work to support new customers to access funding to source essential household equipment, furniture & flooring

Triage:

- Where required, you will support the wider Money Matters Team with the triage of new referrals
- When required, you will provide telephone cover for the Money Matters Hotline



Person Specification

Money Matters Outreach Co-Ordinator

Qualifications:

• Minimum 2 GCSE passes in English Language and Mathematics or equivalent

Knowledge, skills, and experience:

- Experience of working with and building relationships with internal and external partners and stakeholders
- Knowledge of local support and advice services, with the desire to reach out to new and emerging services.
- Excellent communication and networking skills
- Confidence to engage in marketing and promotional activities, such as video, social media, and website presence, to connect with our customers
- Experience of working with diverse customer groups, including lowincome/financially excluded households
- Experience of the preparation and delivery of presentations
- Ability to work in a busy high-pressure environment
- Flexibility, self-motivation, enthusiasm and resilience, with the ability to work on own initiative.
- Excellent attention to detail
- Excellent customer service skills
- Excellent ICT skills and experience of using a range of software packages
- Up to date knowledge of the welfare benefit system and money advice is desirable
- Full driver's licence and access to a vehicle for business use

Competencies:

- Adheres to and promotes the Groups business values. Deals with customers and colleagues with commitment, integrity and respect.
- Recognises and respects the individual value of all employees. Adopts an open, flexible and receptive approach to working with others.
- Produces accurate and high-quality work. Uses initiative and consults with manager where required.
- Articulates opinions and information confidently and clearly. Actively listens to the communications of others.
- Supports and shares information with team colleagues, actively participating in decision-making and problem solving to improve services.
- Assists in identifying problems, offering appropriate ideas to resolve them.
- Demonstrates judgement and the ability to contribute to decision-making at a local level. Seeks advice and information when appropriate.
- Is aware of main company objectives, demonstrating flexibility in task management and priorities as required.
- Contributes ideas to facilitate change and improve services.



Other:

- Must possess a current driving licence.
 Attendance at occasional out of hours meetings may be required plus flexibility with regard to hours worked