



Tai
AELWYD
Housing

**Providing homes and
building communities with
Christian care and
compassion**

Finance Officer Recruitment Pack

January 2022

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Welcome from Sharon Lee, Chief Executive

These are exciting times for Aelwyd Housing as we continue the journey in our full and rich story.

I joined Aelwyd Housing in 2020 and very quickly saw what an amazing organisation this is. The commitment of our staff to outstanding service for residents is exceptional, and this is reflected in the consistently high satisfaction feedback from the people who live in our homes. Aelwyd has a rich heritage over many decades of being at the heart of communities across South Wales. Our roots are firmly planted in a desire to make a difference, through the homes and services we provide.



Our heritage is important to us, and all our homes are built on former church land that was once used to strengthen community and bring a sense of connection and belonging. Our Christian ethos and our values underpin all that we do and makes us unique in the Welsh housing sector. This ethos means that we deliver excellent services, with compassion, inclusion, and connection for people of faith or none. We are committed to embracing diversity in the workplace, as we know it makes us a better organisation.

We are ambitious for the future and want to build on our strong heritage and become an organisation that has an even greater impact in Wales.

We are looking for someone exceptional to join us as a Finance Officer. This is a key role where you will be involved and gain experience in all aspects of our work. Whilst finance management and support will be your day-to-day responsibility, our team is small and a willingness to be flexible and adaptable is essential. You will have regular contact with our residents and it's important that you can relate to them in a compassionate and caring way. If successful you will work closely with all colleagues, suppliers, and contractors. You will be part of taking Aelwyd Housing forward and your thoughts and ideas will be important to shaping how we work.

You will be someone with the drive and passion to deliver excellent work because well managed finances are essential to services for our residents. You will have a strong team working ethos and the heart for our work. If you think you are the right person to join us, then please apply. We look forward to hearing from you.

Sharon Lee

Chief Executive

Our history

Aelwyd (which means 'hearth' the heart of a home in the Welsh language) is a Charitable Housing Association, with a Christian ethos.

We were formed in 1991 as a partnership between the Baptist Housing Association (BHA) Presbyterian Church of Wales, and United Reformed Church (Wales Province).

BHA had been founded as the Baptist Men's Movement Housing Association in 1966 to provide housing for retired Baptist ministers and missionaries, but over the years had expanded to cater for older people in general. In Wales, the first housing scheme was built at Splott in Cardiff in 1978.

The three bodies met together, and discussions took place culminating in the registration of Aelwyd Housing Association in March 1991.

We currently own and manage 256 homes across ten local authorities in South Wales.

Whilst no new building development has been undertaken since 1996 our Board has continued to periodically review and reassess this decision as well as evaluating and pursuing alternative ways and opportunities to grow the business. Our current Business Plan is ambitious in seeking opportunities to grow.

Formerly classed as a De minimis organisation, in October 2017 Aelwyd Housing was brought under the umbrella of full regulation by the Welsh Government. The Association has achieved the highest possible rating (Standard/Standard) each year since. Aelwyd Housing is the only former De minimis housing organisation in Wales to achieve this.

In 2019 we moved from our offices in the centre of Cardiff to Morganstown on the edge of the city, and the beautiful Welsh Valleys. Our location is close to the M4 and has parking and excellent transport links.

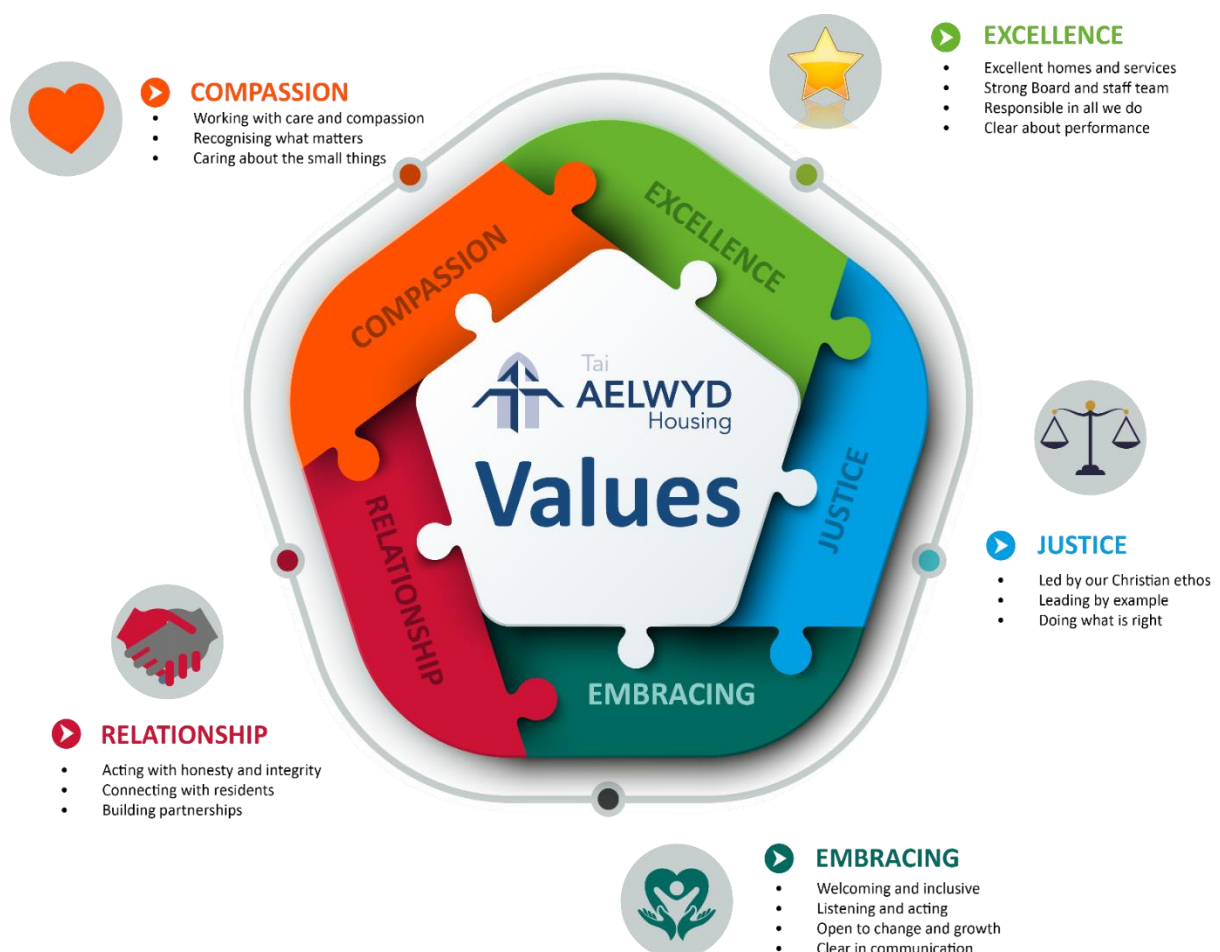


Our vision and values

Our vision is our core purpose and the reason why Aelwyd Housing exists.

Our Values are at the heart of everything we do and shape our culture. They flow through the way we deliver services, in every interaction with residents, and in how we appreciate and treat our staff.

*Providing homes and
building communities through
Christian care and compassion*



About the role

This role is a key part of the future success of Aelwyd Housing, and how we remain financially well managed to support our existing and future residents.

Working closely with the Director of Finance and Finance Officer (Rents) you will be a key member of the team and will help us deliver our Business Plan objectives. You will provide day-to-day finance support and will be a key point of contact for Management Team, contractors, and suppliers. You will be responsible for providing accurate and timely financial information and be confident working on your own as well as being part of a team.

Our Christian ethos is important to us and gives us a foundation from which we seek to impact communities. We are looking for someone who can empathise with and reflect that ethos.

Working closely within a small team, a broad spectrum of knowledge and a willingness to 'pitch in', is essential. As part of a small team, you will get experience in many areas both within Finance and across the organisation. You will also get the opportunity to review processes and procedures and help improve efficiency.

This role will be office based and will provide essential support to the Director of Finance. However, we support staff who want the flexibility to work from home too. You will thrive on being organised and good at communicating with others. Attention to detail is very important in this role and enjoying being part of a team is crucial.

This is a key role at Aelwyd Housing, so it's an exciting opportunity to make it your own. Your voice will matter, as our culture is to encourage all staff to bring thoughts and ideas about how we can keep improving.

Management Team

Sharon Lee - Chief Executive



Sharon joined Aelwyd Housing in 2020. She has worked in the housing and homelessness sectors in Wales and England for almost 30 years. Before joining Aelwyd she was the Director of a national homelessness charity and was previously Head of Corporate Services at a large Welsh housing association. Sharon is an active member of her local church and has been involved in community projects for many years.

Sarah Mulcahy - Deputy Chief Executive/ Director of Finance



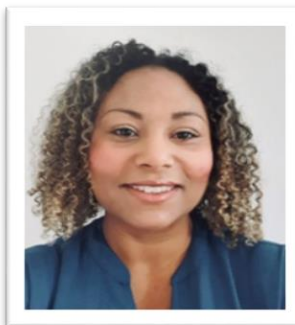
Sarah has worked at Aelwyd Housing for 27 years starting as Finance Officer and later as Director of Finance. Sarah is a Chartered Management accountant. She wears many hats including Deputy Chief Executive and being responsible for Human Resources. She is an elected member of the Governing Body of the Church in Wales, a Trustee of Monmouth Diocesan Board of Finance and an active member of her local church.

Jeremy Dickson - Director of Property Services



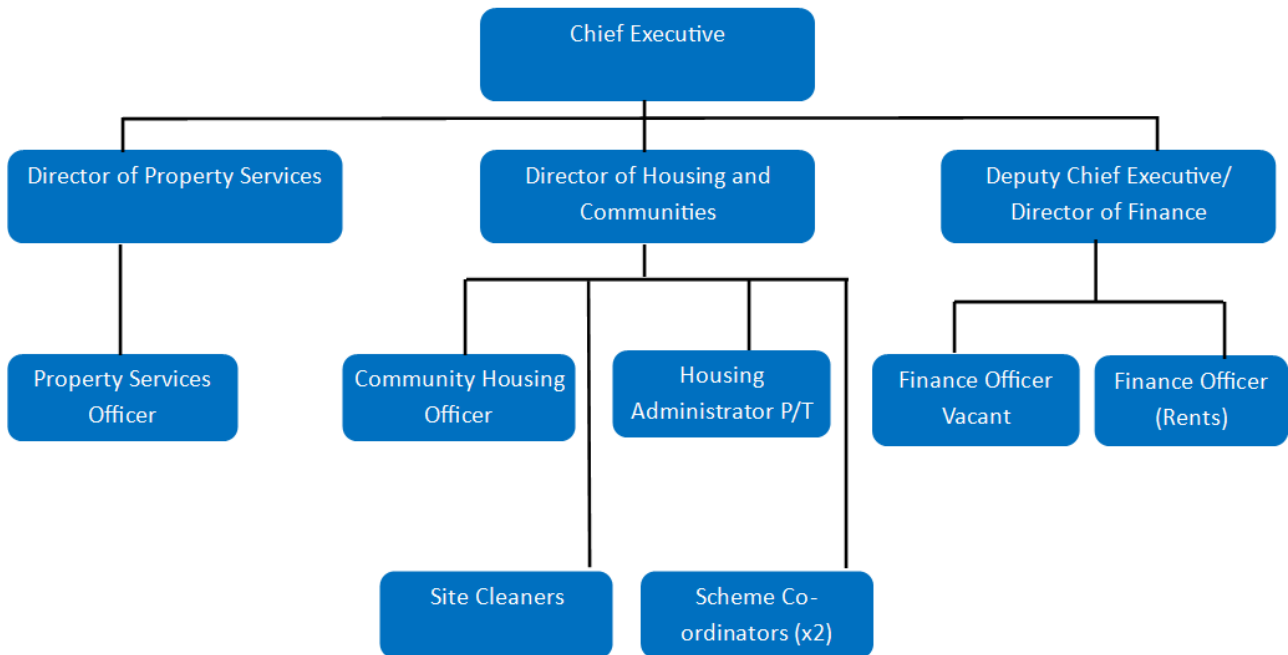
Jeremy joined Aelwyd Housing in 2019 having been a building surveyor for most of his working life, initially starting off with central government before spending time with a local authority. He has worked at several Welsh housing associations and worked for a large organisation on all aspects of the Asset Team's work.

Gemma Watkins - Director of Housing & Communities

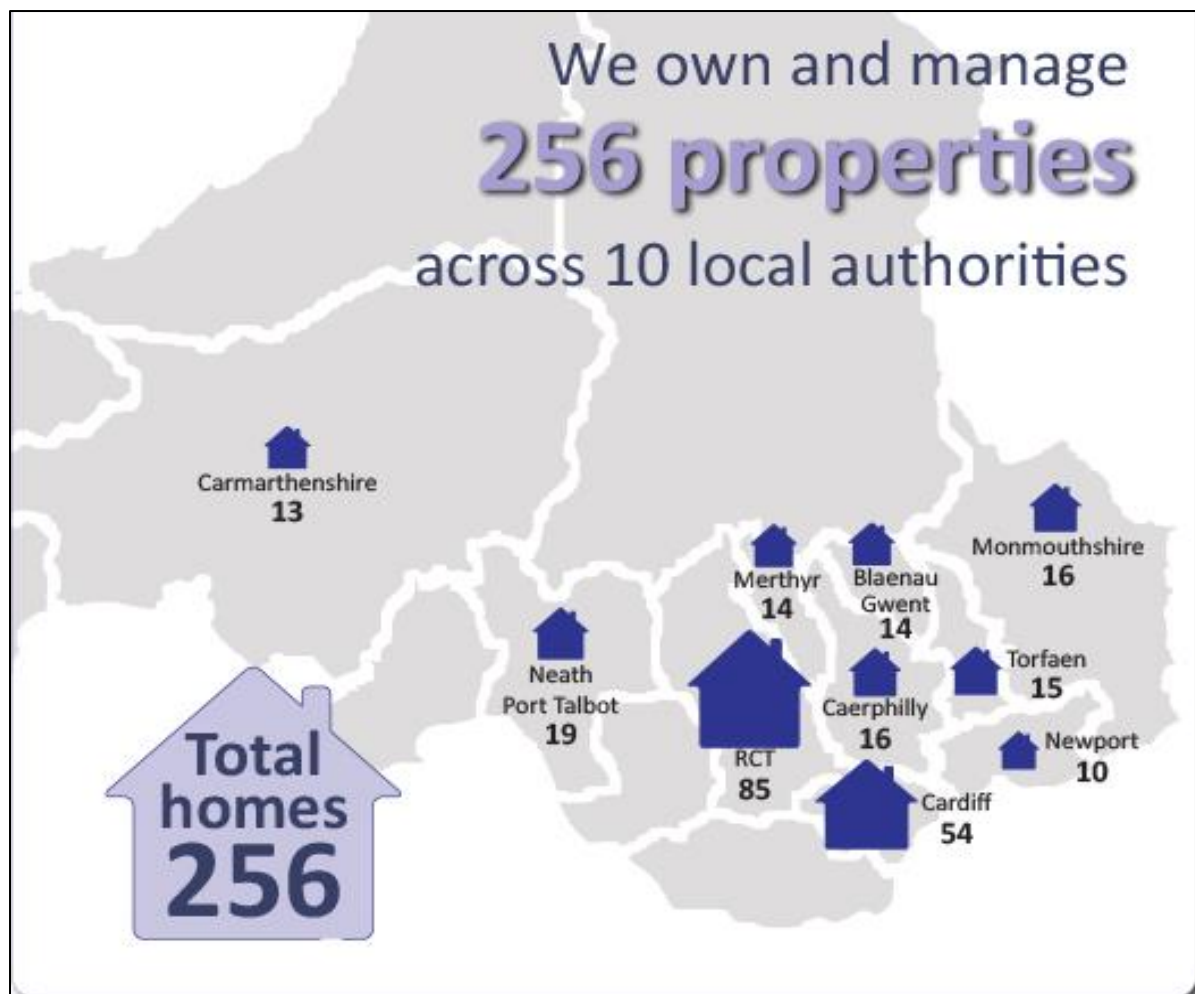


Gemma joined Aelwyd Housing in 2020. She has worked in Housing for almost 20 years, working for a local authority and was Head of Housing & Communities at a community-based housing association. Gemma has served on several boards and has mentored junior housing staff. Gemma is a qualified project manager and is passionate about equality and putting residents' needs at the heart of service design and delivery.

Staff Structure as at 31st December 2021



Where we operate



Finance Officer

Role Profile

Responsible to: DIRECTOR OF FINANCE

Responsible for: N/A

Job Purpose

- To assist in providing a comprehensive financial management service, and to work with the Director of Finance in ensuring the Association continues to have strong, well-managed finances
 - To work in line with our Christian ethos and values, in contributing to the provision of high-quality services with care and compassion
-

Key Responsibilities

General

- Prepare and present monthly budgetary analysis to the Management Team and investigate variances
- To assist the Director of Finance in the production of accurate and timely financial information and to ensure the accurate production of day-to-day financial records
- General office administrative duties including dealing with queries from residents and liaising with contractors and suppliers

Purchase Ledger

- Preparing and processing weekly contractor and supplier payment runs
- Logging, maintaining, and filing invoices
- Investigating purchase ledger queries
- Maintaining the accuracy of supplier details
- Checking and processing staff reimbursement expense claims

Accounting Procedures

- Ensuring the accuracy of ledger accounts
- Reconciling bank and other control codes including reconciliation to the Housing Management system
- Preparing month end journals to produce monthly management accounts, and regular liaison with the Management Team to ensure accurate monitoring of budget figures
- Preparation of rolling annual cash flow
- Maintaining the General Ledger integrity
- Ensuring all ledgers, bank and resident transactions are fully reconciled
- Assisting in the preparation of quarterly management accounts and year-end accounts
- Working with the Director of Finance to prepare Charity accounts on behalf of a managed Almshouse organisation

Other Duties

- Maintaining and renewing company insurance policies, including the processing of insurance claims
- Being involved in projects to improve systems and controls as necessary
- Being aligned with and committed to the ethos and Values of the Association
- Complying with all Association policies and procedures
- Being committed to equality, diversity, and inclusion in the workplace and in services to residents
- Carrying out any other duties commensurate with the post as reasonably requested by the Director of Finance or Chief Executive
- Being prepared to take on responsibilities that are aligned with the strategic aims of the Association

The above responsibilities should be read in conjunction with all express contractual terms relevant to your employment and any other non-contractual Policies and Procedures published by Aelwyd Housing, which are amended from time to time.

In addition to the specified Job Purpose and Responsibilities all staff are expected to: -

Equality

Proactively promote the principles and practices of equality, diversity, and inclusion to ensure its effective implementation within their own work and the work of team members, as appropriate and to abide by and support the Aelwyd Housing's Equal Opportunities Policy as an integral part of all duties.

Health and Safety

Understand their personal responsibilities for ensuring the highest standard of Health and Safety towards themselves and others, understand the Aelwyd Housing Health and Safety Policy, including details of relevant responsibilities for employees and the Board as well as the consequences for failing to follow them.

Confidentiality

Have a duty of confidentiality to residents, colleagues, and any other persons or organisations data/information that may be used or held by Aelwyd Housing. All data/information should be treated as confidential and should only be collected and/or disclosed on a need-to-know basis and where a legal basis has been satisfied in the relevant legislation.

Under no circumstances should any personal data/information or sensitive personal data/information or business sensitive data/information be divulged or passed on to any persons or organisations that are not permitted to receive such data.

Data Protection

In line with legislation, and organisation policy, all personal data/information will be processed in line with the Data Protection Act 2018. This includes how staff collect, use, retain, share, and destroy personal data/information.

Value for Money and Financial Regulations

Understand that when involved in making decisions to procure goods or services, staff are responsible for doing the right thing to ensure that value for money is achieved. This may involve conversations with specialist or more senior members of staff before any commitment to purchase is made, seeking approval in accordance with the Delegated Authority List and the Financial Regulations. All purchasing decisions and any costs incurred on behalf of Aelwyd Housing must be reasonable, made in a responsible manner, supported by a genuine business need and represent good value, in accordance with Aelwyd Housing policy and procedure.

Learning and development

Attend and engage in all training identified as necessary to the role. This may involve achieving competency in specific areas to ensure legislative compliance and participating in developmental training to promote organisation culture. Staff will also be required to participate fully in the Aelwyd Housing performance development process and personally commit to identifying, achieving and maintaining the skills and qualities required to fulfil their role and maximise their potential.

Person Specification – Finance Officer

	Essential	Desirable:
Education	<ul style="list-style-type: none"> • Educated to a good standard (e.g 5 x GCSE's A*-C including English and Maths, or equivalent) • Excellent literacy and numeracy skills • AAT Qualified or part qualified ACCA/CIMA or equivalent (e.g. Accounting/Finance degree) 	
Experience	<ul style="list-style-type: none"> • Experience of working in an office environment • Minimum two years' experience of accounting systems including nominal ledger, purchase ledger and cash book • Experience of general routine accounting processes • Minimum two years' experience preparing bank and other balance sheet reconciliations • Experience of producing cash flows 	<ul style="list-style-type: none"> • Experience of working in a finance role in the housing or charitable sector • Experience in working with Sage 200 • Experience of contract management • Knowledge of housing association accounting • Experience of dealing with contractors and suppliers
Knowledge	<ul style="list-style-type: none"> • Able to use Microsoft Office software, particularly Excel to an intermediate level • Ability to use online meeting platforms such as Zoom, Microsoft Teams, 	<ul style="list-style-type: none"> • An awareness of the role of social landlords • An awareness of service charges

	GoToMeeting	<ul style="list-style-type: none"> • Knowledge of Health & Safety and awareness of equality, diversity, and inclusion • Ability to speak and/or write in the Welsh language • An understanding of office support infrastructure e.g. IT and telephony systems
Skills	<ul style="list-style-type: none"> • Methodical approach to work, attentive to detail, able to plan, prioritise workload, meet deadlines and work without close supervision • A commitment to providing an excellent finance service to staff, contractors and residents • Excellent communication skills, in writing, in person and over the telephone • A flexible and cooperative approach understanding the wider impact of work on other members of staff • Ability to use own initiative • Excellent organisational skills and good at problem solving • A confident and competent decision maker, with the ability to respond to day-to-day enquiries • Ability to work well as part of a team, bringing a positive attitude and the ability to work with staff from across the whole organisation 	<ul style="list-style-type: none"> • Transferable skills gained through knowledge of other sectors • Ability to work occasionally outside of office hours
Personal Qualities	<ul style="list-style-type: none"> • Self-aware and displays respect and empathy for residents and colleagues • A commitment to the Association's ethos and values • Positive attitude with the confidence to constructively challenge the status quo 	

Summary of main benefits

Working for Aelwyd Housing gives you access to a great range of benefits such as a generous annual leave entitlement, competitive salary and a range of health and wellbeing benefits:

Competitive salary

We offer a competitive salary of **£27,000** per annum with an annual pay award agreed by the Board.

Annual leave

You are entitled to 25 days leave per year pro rata, increasing by one day for every year of service up to a maximum of 30 days, plus the designated statutory bank holidays. In addition, you will receive two ex gratia leave days to use at Christmas.

Pension

We know that financial security has a positive effect on wellbeing whether you are close to retirement or not. We offer a Defined Contribution (DC) Scheme with an 8% employer contribution.

Employee wellbeing

Our staff are important to us. That's why we're committed to offering the widest possible range of working arrangements to support and promote your wellbeing, and work-life balance.

Supporting through illness

If the unfortunate happens and you are unable to work through sickness, illness or injury, Aelwyd Housing supports you with an occupational sick leave scheme and appropriate role adjustments.

Learning and development

We value our staff highly and want to invest in providing the right support and skills to really make a difference to the services we provide. We regard the development of staff as a key responsibility of everyone's role. All staff must make a personal commitment and investment of time to access learning and development opportunities that will enhance personal growth and develop skills and behaviours.

Finance Officer

Location: Cardiff (with flexibility to also work from home)
Hours: 35 hours per week
Contract type: Permanent
Salary: £27,000 per annum

If you are an experienced finance professional who is passionate about addressing housing need, and believes everyone should live in a good home, with a landlord who provides excellent housing services; we want to hear from you. This is a great opportunity to join Aelwyd Housing, a values-based organisation which strives to live out its Christian ethos each and every day through our work with people of faith and none.

The opportunity

This is an opportunity to join us at an exciting time for the organisation and be part of our team working across South Wales. You'll be based at our office in Cardiff, with the flexibility to also work from home. Aelwyd Housing has been through a period of transition over recent years, and we are stronger than ever. This is an opportunity to be part of our future and help us move into it.

The role

Working with the Director of Finance, this is an opportunity to help support the delivery of services that matter to our residents by being part of a team that provides an excellent finance management service.

The Finance Officer will provide day-to-day finance support and will be a key point of contact for Management Team, contractors and suppliers. The role also requires the ability and vision to challenge the norm and contribute to new projects that strengthen the organisation. We need someone who enjoys being part of a team and thrives on being highly organised with giving attention to detail.

The organisation

We are a charitable housing association that owns and manages 256 homes, predominantly for people aged over 55 throughout South Wales. With a proven track record of providing high quality accommodation and services, Aelwyd Housing receives consistently high levels of resident satisfaction, and is able to provide a consistency and continuity of service to a very high standard.

The candidate

You will bring personality, experience, and knowledge of what it takes to support us in delivering an excellent service. You will be committed to ensuring our finances are well managed and you will care passionately about doing the right thing. You will be able to demonstrate an empathy with our Christian ethos and reflect our values in all you do.

How to apply

Thank you for your interest in this position. This information will help you complete your application.

Please contact Joan Mumford joanm@aelwyd.co.uk to ask for an application form and ensure that you submit it before the closing date. We do not accept CVs.

If you cannot attend the advertised assessment date(s) please indicate this in the appropriate place on the application form.

The equal opportunities information requested is for monitoring purposes only, in line with our commitment to equality, diversity, and inclusion and will not affect the outcome of your application. All applicants who meet the assessment criteria will be guaranteed an interview.

It is your responsibility to ensure that we have received your application. If you don't receive confirmation of receipt of your application from us within 24 hours of sending, please email joanm@aelwyd.co.uk as above to make sure it has arrived.

Key dates

Closing date for applications: **5pm Friday 21st January 2022**

Email address for sending applications: joanm@aelwyd.co.uk

Address to post application:

Aelwyd Housing
9 Ty Nant Court
Morganstown Cardiff
CF15 8LW

Formal interviews: **Friday 28th January 2022**

The Interview process may be conducted virtually via Zoom due to Covid19 restrictions.

If sending an application in the post, please mark correspondence

Private & Confidential FAO Joan Mumford

If you would like to arrange an informal chat about the role, please contact Sarah Mulcahy, Director of Finance sarahm@aelwyd.co.uk

For additional information about Aelwyd Housing please visit www.aelwyd.co.uk



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