



Llywodraeth Cymru  
Welsh Government

**HOMELESSNESS ADVICE SERVICE GRANT**  
**2026 - 2029**

**GUIDANCE NOTES**

### **INTRODUCTION**

1. The Welsh Government is committed to promoting sustainable improvements to the health and well-being of all the people of Wales and recognises social welfare<sup>1</sup> information and advice has an important role in helping people make informed decisions to access their rights to civil justice and ensuring everyone in Wales has a fair and equal chance in life.
2. The Welsh Government Homelessness Prevention Grant (HPG) has historically funded specialist, independent homelessness advice services in Wales, with funding for 19 advice services awarded to Shelter Cymru since the HPG began in 2003. In 2015, following an independent review of Welsh Government Homelessness grants, the various services were consolidated into a pan-Wales Homelessness Advice Service, delivered by Shelter Cymru.

### **GRANT FUNDING - PURPOSE**

3. The Homelessness Advice Service Grant will not offer core funding to information and advice providers. It will fund the delivery of 'free to the client' homelessness and housing information and advice services, which demonstrate and evidence how they will ***'attain the most effective and sustainable outcomes for those seeking advice'***.
4. The Homelessness Advice Service Grant aims to offer a positive contribution to help meet the ongoing increase in demand for access to advice services and help to ensure more people throughout Wales have access to the information and advice that they need.
5. It is a principle of the fund that the grant will support the most effective advice providers whether they operate within the third sector, the private sector or within local authorities.
6. The homelessness and housing advice services delivered by the Homelessness Advice Service Grant will focus upon effectively promoting early access to advice for people who may be at risk of homelessness including people from marginalised and disadvantaged population groups as well as ensuring people accessing advice are given the opportunity to develop their resilience to future social welfare problems. The fund will also enhance access to services that can deliver the type of specialist advice that people need to resolve complex and often entrenched problems.

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<sup>1</sup> Social welfare advice includes debt, discrimination, education, employment, housing, immigration and welfare benefits.

7. The Welsh Government recognises that grant funding for advice services ought to be longer-term as this would enable funded providers to plan more effectively, invest in partnership working, offer greater flexibility in how they manage their services and help with retention of their expert staff.
  8. **The Welsh Government therefore intends to make the grant funding available, following an open competitive bidding process, during the period 01 April 2026 to 31 March 2029.**
  9. Furthermore, it is possible that the grant funding to successful Bidders could be extended beyond the initial three-year period. Near the end of the initial 3 years, rather than re-open a round of competitive funding, a benchmarking exercise will determine whether organisations could be offered a further award of up to 3 years of funding. Organisations below the benchmarking threshold would not be awarded extended funding under the scheme. At the end of the 6-year period, the grant scheme (if continuing) would then open up for a new round of competitive funding, allowing new and existing organisations to apply for the funding.
  10. The Welsh Government would like Bidders to put forward proposals for how they would deliver a Pan-Wales Advice Service providing information and/or advice to an underrepresented population group across the regions.
  11. Applications for the delivery of a service should meet the requirements set out below and should also demonstrate how they will complement the other information and advice services supported through the Welsh Government Single Advice Fund.
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## Homelessness Advice Service

12. Bidders are asked to demonstrate how their proposal for a Pan-Wales Homelessness Advice Service will:
- I. provide an independent housing information, advice and advocacy service to those in housing need in all communities across Wales
  - II. improve the quality of information and advice services by developing a quality assured service
  - III. improve access to services, particularly amongst people who tend not to access services until they are in crisis
  - IV. embed the homelessness prevention agenda within the delivery of advice services
  - V. ensure lived experience is incorporated into the delivery and accessibility of advice services
  - VI. ensure that services are accessible to all
  - VII. be designed to ensure people accessing information and advice services are given tangible opportunities to develop their knowledge, capability and skills with the aim of, as far as practical, improving their resilience to similar problems reoccurring
  - VIII. develop outcome measures for information and advice interventions, which are linked to the goals within the Wellbeing of Future Generations (Wales) Act 2015.
13. The service should include a remote service accessed through a single telephone number, and which quickly enables the person calling to receive the specialist advice they require. The service also needs to deliver via face-to-face services in accessible locations where people tend to go within local communities across a region.
14. It is important that Bidders explain how their proposed service delivery model will link with and complement their community based face-to-face services. For example, setting out how an adviser handling the first contact will ensure that an individual is offered direct access to their regional face-to-face caseworker services when needed.
15. Bidders will also be required to propose delivery models that can proactively target early access to services for people who may have a greater need for social welfare advice as a result of specific characteristics they may possess or as a result of the specific circumstances they are experiencing. The Welsh Government does not wish to be prescriptive over who these groups might be, but they could for example include people experiencing domestic abuse or those living with a chronic medical condition. The Welsh Government request that Bidders consider those most in need of advice in the respective regions and put forward proposals to ensure access for these groups is prioritised within the service delivery model. Where specific groups of people are being targeted,

service models will be expected to incorporate and utilise the expertise of organisations that specialise in supporting those particular groups of people.

16. Bidders are requested to explain how their proposed service delivery model will effectively coordinate the delivery of services within **all** the individual local authority areas in Wales and ensure services will be delivered in accordance with the needs of local communities across the regions.

17. A Bidder will need to explain how their proposed service will complement other local and national advice services available to people within the region.

## **Funding Available**

18. A Bidder will be required to submit a budget expenditure profile demonstrating how they intend to utilise the funding on the provision of the information and advice services for the grant period.

<b>Maximum Funding Available</b>	<b>2026/27 £</b>	<b>2027/28 £</b>	<b>2028/29 £</b>
	<b>£1,468,710</b>	<b>£1,468,710</b>	<b>£1,468,710</b>

## **WHEN TO APPLY**

19. The application to apply for grant funding was published by the Welsh Government on **23 July 2025** and the deadline for applications is **5pm on 15 October 2025**.
20. **Late applications will not be accepted.**
21. The deadline for receipt of any questions relating to the grant will be **5pm on 20 August 2025**. A list of the responses to all questions asked will be published on the Welsh Government website and updated regularly. Any questions should be submitted via:  
**[HousingManagementAndHomelessnessPreventionPolicy@gov.wales](mailto:HousingManagementAndHomelessnessPreventionPolicy@gov.wales)**  
Interested parties asking questions should do so in the knowledge that their question and the response to it will be published.

## **WHO CAN APPLY**

22. Applications for the funding can be submitted by an individual provider or by a collaboration of providers who are able to demonstrate how they will meet the full range of advice needs of the diverse communities of Wales.
23. The Welsh Government's Homelessness Advice Service Grant is a competitive scheme, and the Welsh Government intends to support only one application for the advice service. If there are no applications that fully and adequately meet the aims and requirements of the grant, Welsh Government reserves the right to support more than one application, where doing so would result in combined services that meet the aims and requirements of the grant.
24. Individual bids will be expected to set out proposals that largely utilise the full amount of funding available.
25. A collaborative application for funding must identify a lead provider. This lead provider will accept the contractual responsibility for the delivery of the grant funded services.
26. An application must also contain full details of all the other partners who will be involved in the collaborative delivery of the funded services.
27. **The Welsh Government is committed to the people of Wales having access to quality assured information and advice services. In line with this commitment, a provider, in a single or a collaborative funding application who will be involved in the direct delivery of homelessness and housing advice services must, at the date of the commencement of the funding period, hold a recognised advice Quality Standard at the appropriate level for the service they are proposing to provide.**

28. Acceptable advice Quality Standards include, but are not limited to, the following quality standards that are accredited to the Welsh Government's Information and Advice Quality Framework:

- The membership scheme owned by Citizens Advice
- The Advice Quality Standard
- The Specialist Quality Mark
- Lexcel
- Families First Quality Award
- Welsh Women's Aid Quality Assurance Scheme
- The Trusted Charity Standard

29. A provider who will be involved in the direct delivery of **debt advice** services will, in addition to holding a recognised advice Quality Standard, need to be Financial Conduct Authority (FCA) regulated, or be exempted from having to be FCA regulated, i.e., a Local Authority.

30. A provider whose role does not involve the direct delivery of generalist or specialist advice, does not need to hold an advice Quality Standard. For example, this will include:

- I. a non-advice delivering partner, whose role within a collaborative application is to co-ordinate and/or manage the delivery of the funded information and advice services on a local, regional or pan-Wales basis or;
- II. a provider whose role within a collaborative application, is to facilitate positive engagement with people/groups who are hardest to reach and/or provide information/guidance on social welfare issues and enable a seamless referral of a person to an advice delivery partner.

31. Welsh Government intends this grant to be focussed upon frontline advice delivery. Within a collaborative funding proposal, a *non-advice delivering partner*, whose role is to co-ordinate and/or manage the delivery of the funded services on a local, regional or pan-Wales basis **must be** a Not-for-Profit organisation who is able to provide evidence of their:

- I. established and successful track record of co-ordinating the delivery of information and advice services and;
- II. comprehensive understanding of the Welsh Social Welfare Advice Sector.

### **COMPLETING THE APPLICATION FORM**

#### **Welsh Government expectations of grant recipients**

32. We (Welsh Government) want to work with organisations who are proud of their reputation, what they deliver, and their conduct. The attached guidance is designed to highlight and clarify the types of behaviours, cultures and values Welsh Government expects to see 'lived out' by its grant recipients. [Welsh Government expectations of grant recipients \[HTML\] | GOV.WALES](#)

33. This guidance has been prepared to help ensure those seeking grant funding include all of the information required for the purposes of assessing their application.

34. Incomplete applications will not be assessed and therefore not considered for a grant.

#### **Section One – Organisation/Lead Provider Details**

In a collaborative application (with delivery involving partner providers), the lead organisation is required to provide their full contact details in section one.

#### **Section Two – Partner Providers (Collaborative Applications Only)**

This section only needs to be completed if it is a collaborative application. It asks for information about the other provider(s) involved in delivering the proposed service who will receive grant funds.

#### **Section Three – Quality Assurance**

Any provider(s) who are seeking funding to deliver specialist advice is/are required to provide:

- I. evidence of the advice Quality Standard that they hold **and** confirm the date at which they will have to reapply for this advice Quality Standard; and
- II. a statement to confirm that they are impartial and have the ability to always act in the best interest of the people who will be receiving the free to client funded advice services; and
- III. if a provider will be delivering a debt advice service, evidence that they are regulated by the Financial Conduct Authority (FCA), or confirmation that they are exempted from having to be FCA regulated. A provider who loses their FCA regulation at any point during the funding period shall inform the Welsh Government immediately. The Welsh Government will have the right to withdraw grant funding in respect of the delivery of debt advice services from



any provider who loses their FCA regulation, regardless of whether they still hold an advice Quality Standard.

A funded provider who stops holding a recognised advice Quality Standard at any point during the grant funding period shall inform the Welsh Government immediately and the funding will be withdrawn.

A provider, in their acceptance of a grant, will be required to confirm that they (and all the partners in a collaborative application) agree to fully engage and participate within the quality assurance measures that the Welsh Government intends to employ.

#### **Section Four – Expected Start Date of Service Delivery**

A Bidder is required to provide confirmation that they can commence delivery of the free to client funded information and advice services from the 01 April 2026.

#### **Section Five – About the Proposed Service**

A Bidder is required to respond to a series of questions about how the service that they are proposing to deliver will meet the purpose of the Grant.

#### **Scoring**

The assessment process will include a weighted scoring system. Where a question will be scored, the relevant score weighting is set out after the question.

A summary of the points weighting is as follows:

<b>Question</b>	<b>Maximum Score</b>
1. Prior Experience	20
2. Proposed Service Delivery	25
3. Service Planning & Co-ordination	25
4. Welsh & Community Languages	5
5. Person-centred Services	10
6. Value for Money	15
<b>Total Maximum Score</b>	<b>100</b>

#### **Question 1 – Prior Experience**

This question asks for an explanation of the experience and proven ability of a provider(s) to deliver ‘free to client’ homelessness and housing rights-based information and advice services at a local, regional and pan-Wales level. In a collaborative application, this extends to all of the service providers who will receive part of the grant. Where a collaboration includes service providers who do not

provide advice, but who may for example facilitate engagement or provide another function, then an explanation of relevant experience regarding that function should also be highlighted in your response to this question.

Bidders are also asked to explain their previous experience of involvement in collaborative service delivery models.

## **Question 2 – Service Delivery**

This series of questions explores how the proposed free to client homelessness and housing information and/or advice service/s will meet the key aims of the Homelessness Advice Service Grant, including how a proposed service delivery model will:

- i. *Provide an independent housing information, advice and advocacy service to those in housing need in all communities across Wales. Be seamless and fully integrated for people who, for example, have advice needs:*
  - across the range of homelessness and housing subject areas, and/or;
  - that pass through various advice types, i.e., guidance to generalist to specialist, and/or;
  - who have contacted the pan-Wales service and need to access locally/regionally delivered services.

Bidders are expected to say in general terms how they will seek to ensure that the service they offer will be joined up with other advice services, many of which would be funded through other funding streams. They are also expected to confirm their willingness to fully integrate their service with the other grant funded advice services across Wales.

To further support joined-up service delivery, Bidders are expected to confirm how they will complement the Welsh Government funded Single Advice Fund which could offer an overall positive contribution as a result of available resources being maximised and duplication of effort minimised. *Bidders are also expected to demonstrate how they will contribute to and engage with the Regional Advice Network and any advice network partnerships established in the regions/nationally.*

It is anticipated that effective partnership working will be at the heart of a delivery model that is aligned to the aim and objectives of the Homelessness Advice Service Grant and a Bidder will allocate some of the available funding in order to build and sustain the network of services that are part of their proposed collaborative delivery model.

The extent to which funded services are effectively integrated will be one of the key areas examined through regular grant monitoring.

- ii. *improve the quality of information and advice services by developing a quality assured service*
- iii. *improve access to services, particularly amongst people who tend not to access services until they are in crisis. In the case of face-to-face services, be able to*

*reach into the heart of local communities, ensuring the funded services are well known and easily accessible and in the case of the pan-Wales remote service, able to achieve a sufficient profile to ensure that the service is well known and easily accessible*

- iv. embed the homelessness prevention agenda within the delivery of advice services*
- v. ensure lived experience is incorporated into the delivery and accessibility of advice services*
- vi. ensure that services are accessible to all*
- vii. be designed to ensure people accessing information and advice services are given tangible opportunities to develop their knowledge, capability and skills with the aim of, as far as practical, improving their resilience to similar problems reoccurring*
- viii. develop outcome measures for information and advice interventions, which are linked to the goals within the Wellbeing of Future Generations (Wales) Act 2015.*

### **Question 3 – Service Planning and Co-ordination**

This series of questions examines:

- i. the robustness of the planning assumptions used to predict the numbers expected to access the service as set out in the Minimum Volume Expectations table in Question 6 of the application form;
- ii. the effectiveness of the planning of the information and advice service to ensure the funded service/s is/are complementary to the advice service resources already operating within a region and pan-Wales, offering an overall positive contribution as a result of available resources being maximised and duplication of effort minimised;
- iii. delivery of information and advice services will be co-ordinated to ensure there is equal and consistent access to the funded service across all parts of the country;
- iv. how the planning of the information and advice service will ensure the funded service will be delivered in accordance with the specific needs of local communities;
- v. how a system of review and innovation will drive forward continuous improvements in effectiveness and efficiency.

### **Question 4 – Welsh Language and Community Languages**

The Welsh Government requires that the funded service will be offered in the medium of Welsh language to any individuals who states that this is their language preference.

The Welsh Government requires access to interpretation services, across the range of community languages, to be offered, as and when required, to people accessing the funded services.

Therefore, a Bidder will need to clearly explain how their proposed service delivery model will ensure there will be consistent and equal access to people accessing funded services who wish to do so in the medium of Welsh, or in any of the community languages.

### **Question 5 – Person-centred Services that Contribute to Well-being**

The Welsh Government has a vision for the people of Wales to be served by quality assured and sustainable advice services that are delivering empowering services that are aligned to the Well-being of Future Generations (Wales) Act 2015.

(<https://www.gov.wales/well-being-future-generations-act-essentials-html>)

In their funding proposal, Bidders are asked to highlight the ways in which their proposed service will contribute to some or all of the seven well-being goals.

1. A prosperous Wales
2. A resilient Wales
3. A healthier Wales
4. A more equal Wales
5. A Wales of cohesive communities
6. A Wales of vibrant culture and thriving Welsh language
7. A globally responsible Wales

In addition, Bidders should describe how they will ensure that service users are involved in the ongoing design and redesign of their service.

### **Question 6 – Value for Money**

Under this question, bids will be scored to prioritise bids that offer the best all-round value for money. Specifically, the information provided regarding minimum volume expectations, the average cost per FTE adviser and the anticipated outcomes will be combined to provide a broad picture of value for money that will be scored, up to a maximum of 15 points.

#### ***I. Minimum Volume Expectations***

A Bidder is required to state their minimum volume expectations (per year for the 3-year grant period) for the number of cases and/or enquiries that they expect to undertake.

Bidders should indicate the numbers of enquiries and cases by advice level. We appreciate that information and advice providers will use differing definitions of enquiries and cases in their recording. For the purposes of providing an indication of the scale of work that is expected to be undertaken in the proposal, we would ask that Bidders complete this section with reference to the following interpretation so

that applications can be assessed for appropriateness of coverage and to ensure that basic value for money is achieved.

By 'enquiry' we envisage a discrete one-off piece of work with a household seeking advice or information where the time spent on that work typically totals less than 30 minutes.

By 'case' we are referring to work typically totalling 30 minutes or more that may require a greater level of recording than an enquiry and which would more often involve the provision of written confirmation of advice.

Where some parts of the proposed service will only be available to people with certain characteristics or people in certain situations, applicants should provide a breakdown of this in brackets after the total number of cases or enquires, wherever applicable.

In the monitoring reports required under this grant, providers will also be required to provide information on the numbers of people advised, including the proportion of repeat clients, and the number of problems advised upon.

## **II. *Proposed Grant Expenditure***

A Bidder is requested to clearly indicate how much Grant funding they are applying for across the funding period.

Bidders are expected to put forward proposals that largely utilise the full amount of funding available.

The maximum funding available to deliver the information and advice service is as set out in the table below:

<b>Maximum Funding Available</b>	<b>2025/26 £</b>	<b>2026/27 £</b>	<b>2027/28 £</b>
	<b>£1,468,710</b>	<b>£1,468,710</b>	<b>£1,468,710</b>

A Bidder is required to complete the expenditure profile and to provide a detailed breakdown of proposed expenditure in the expenditure spreadsheet. Bidders should include as much information as possible to detail how the grant funding being requested will be used for the provision of the information and advice service in each financial year across the 3-year funding period.

Although some formula has been included in the spreadsheet to assist applicants, it is the Bidder's responsibility to check that all details shown on the spreadsheets are correct. This will particularly be the case where additional lines are added, and formulae may need to be adjusted.

Welsh Government encourages a Bidder who is seeking grant funding to offer salaries that meet or exceed the real Living Wage. If any salaries within a Bidder's proposal are below the real Living Wage, we will be keen to discuss with the Bidder any ways that we can help them to be able to offer salaries that meet or exceed the real Living Wage. Further information on the real Living Wage is available from <https://www.livingwage.org.uk/>.

### **Important notes**

- a) Whilst Welsh Government is not proposing to specify an expected average total cost per FTE generalist and specialist adviser service, the average total cost per adviser will be an important determinant in assessing whether **i)** the average cost is adequate to give confidence that high quality services are likely to be provided and **ii)** that the average cost is sufficiently competitive to ensure that the social impact of the funded service is maximised.
- b) Average total cost per adviser is calculated by taking the total proposal costs and dividing this by the number of proposed advisers. A Full-time Equivalent (FTE) is considered to work 37 hrs per week. Where this is not the case, applicants should total the number of hours worked by the proposed advisers and divide by 37 to give an FTE figure.
- c) Welsh Government expects as much of this grant as possible to be focussed on frontline delivery. Costs relating to the co-ordination of different services and to consortia as a whole should be kept to the absolute minimum level necessary for effective integrated delivery and reporting.
- d) The Welsh Government will approve the reasonableness of any Management charges/Central costs being requested.
- e) The Welsh Government will not provide a financial contribution towards any redundancy costs.

### ***iii) Outcome Expectations and Monitoring***

A Bidder is required to provide information on the key performance measures that they are proposing to report on and explain how the performance measures will demonstrate to the Welsh Government that the information and advice service they are proposing to deliver will attain the key aims of the Homelessness Advice Service Grant and align to the **Ending Homelessness Outcomes Framework**.

A Bidder will also be required to confirm that, if they receive funding, they will work with the Welsh Government to jointly develop and agree additional performance and outcome measures.

### **Section Six - General Data Protection Regulations (GDPR).**

All provider(s) must confirm their understanding, acceptance and compliance with the following conditions:

- I. All awards of grant funding must be compliant with the General Data Protection Regulations (GDPR).
- II. All personal information collected and held by a funded provider will need to be treated in line with the GDPR regulations.
- III. Carrying out the Purposes of this grant will require a funded provider to process personal data. But no personal data will be shared with Welsh Government.
- IV. The successful provider(s) will be the Data Controller and data processor.
- V. As the Data Controller and data processor, a provider(s) must only ask for data that is necessary and relevant to the purpose of this project and must only collect data when there is a specific, lawful reason to do so.

In completing Annex A of the application form, Bidders will advise which personal data items they will collect in the provision of the proposed service.

### **Section Seven - Declaration**

In a collaborative application (with delivery involving partners) the 'declaration/certification should be completed by the lead provider.

Anyone signing this declaration should be fully authorised by both their own organisation and, in the case of a collaborative application, by the other partner(s) involved in the bid.

Although copies of partnership agreements between partners in a collaborative bid are not requested as part of this grant application, this declaration confirms that they are in place and available to Welsh Government if requested.

## **APPLICATION ASSESSMENT CRITERIA**

35. The purpose of running this open grant application exercise is to enable the Welsh Government to identify the service delivery models that:

- I. best meets the aim and objectives of the Homelessness Advice Service Grant, and;
- II. provides the most confidence in terms of high-quality service delivery, and;
- III. offers best value for money.

36. There will be an initial assessment of all proposals, and:

- I. a proposal not meeting the requirement for a provider involved in the delivery of homelessness and housing information and advice services to be a holder of a recognised advice Quality Standard (or unable to provide robust evidence that they will be at the date the funded services commence, such as confirmation that they have applied for an advice Quality Standard audit) will be rejected.
- II. a proposal where a provider will be delivering debt advice services who is not FCA regulated (or unable to provide robust evidence that they will be at the date the funded services commence) and is not exempted from seeking such regulation will be rejected.
- III. a collaborative proposal, where a non-advice delivering partner will be co-ordinating the funded services and they are not a Not-for-Profit organisation will be rejected.

37. Incomplete applications will be rejected at the initial assessment stage.

38. The assessment of the responses to the questions in the application form will be based upon a scoring methodology using weighted scoring (as displayed in the table on page 9) with the maximum scores listed for each question to be assessed.



### **ADDITIONAL INFORMATION**

#### **TECHNICAL SUPERVISION**

39. Technical supervisors of the staff engaged in delivering the funded advice services must be experienced social welfare advisers and, in the case of the specialist advice services, a technical supervisor must be an experienced specialist caseworker within the funded subject area being delivered, i.e., housing, debt advice etc.

#### **RECORDS OF ADVICE SESSIONS AND WORK UNDERTAKEN**

40. All the cases funded by the Welsh Government must be evidenced by a comprehensive case record, regardless of whether consent is given for external evaluation (see below). This will include client and third-party interactions, and any work undertaken to progress or review the case.

#### **REPORTING AND MONITORING INFORMATION**

41. A funded provider will be required to provide the Welsh Government with quarterly monitoring reports on the performance of the funded service, as well as provide compliance checks. The Welsh Government will provide guidance.
42. A funded provider will be required to provide information on the protected characteristics of people accessing the information and advice service. The Welsh Government and the funded provider will agree the information to be provided.
43. A funded provider will be required to provide a copy of their updated risk register to the Welsh Government when requested. Where a new significant risk is identified during the reporting period, this should be reported to the Welsh Government within five working days, or sooner if possible.

## **EVALUATION**

44. The Welsh Government is exploring the links between the outputs from the advice services it commissions and longer-term outcomes for the people who access these services. A provider receiving Welsh Government Grant funding will be expected to fully engage in this area of developmental work.
45. This exploration of the long-term sustainable outcomes for people who access Welsh Government funded advice services has the potential to include the use of a third party to evaluate outcomes and/or undertake additional research with individuals who access the funded advice services.
46. The Welsh Government will work with all the providers it funds to establish best practice approaches to promote the benefits of evaluation to service users and encourage their informed consent to evaluation. A funded provider will be required to confirm they (and all the partners within a collaborative service delivery model) consent to participate in this work during the period they are receiving grant funding.

## **MISCELLANEOUS**

47. A Bidder is responsible for obtaining at their own expense advice regarding the possible application of any contingencies; or other circumstances; or matters which might in any way affect their application for grant funding. For example, if an employee of a current recipient of one of the Welsh Government's grant funding streams queries whether their current grant funded employment is covered by the Transfer of Undertakings (Protection of Employment) Regulations 2006 (TUPE).

**FINANCE GUIDANCE**

48. A funded provider will be asked to confirm the expenditure profiles and provide updates to anticipated expenditure at regular intervals through the grant funding period.

**Claims and Payment**

49. Payment of the grant will be made quarterly in arrears on submission of accurately documented claims in accordance with the provisions that will be set out in the formal grant award letter/conditions. However, payments may be made in advance where a need for this can be clearly demonstrated. If appropriate, providers can request a Payment in Advance template or confirm that one has been submitted for the current financial period if a provider is in receipt of other Welsh Government grant funding.

**Privacy notice: Welsh Government Grants**

50. For information as to how we will handle any personal data you provide in relation to your grant application, please click [Privacy notice: Welsh Government grants](#)
51. The information we have collected from you will be shared with fraud prevention agencies that will use it to prevent fraud and money-laundering and to verify your identity. If fraud is detected, you could be refused certain services, finance or employment in future.
52. Further details of how your information will be used by us and these fraud prevention agencies, and your data protection rights, can be found by contacting; [Data.ProtectionOfficer@gov.wales](mailto:Data.ProtectionOfficer@gov.wales).

## **Definitions of Types of Information and Advice<sup>2</sup>**

### **Type One – Information**

Describes a service which gives clients the information they need for them to know more and do more about their situation. It can include providing information about policies, rights and practices; and about local and pan-Wales services and services that may be able to offer the client further help. Responsibility for any further action rests with the client.

E.g. a client asks whether he can get help with his council tax. You provide him with a leaflet “Help with Council Tax” and provide details of two local advice services that offer advice on welfare benefits.

### **Type Two - Guidance**

Describes a service that may discuss the advantages and disadvantages of different options without making specific recommendations. It may include making and receiving referrals, identifying emergencies and prioritising issues.

E.g. a client wants to understand his finance options before choosing a new or used car. The money adviser explains the features of various purchasing options but does not recommend a particular finance option or provider.

### **Type Three – Advice**

Describes services that diagnose the client’s legal problem and any related legal matters; identify options and relevant legislation and decide how it applies to a client’s specific circumstances; includes identifying the implications and consequences of such action and grounds for taking action; includes form filling; provides information on matters relevant to the problem such as advising on next steps and identifying dates by which action must be taken to secure the client’s rights. Advice may take place on more than one occasion.

E.g. a client asks whether she can get help with caring for an elderly neighbour. You carry out a benefit check and identify she may be entitled to claim Carers Allowance depending on her neighbour’s benefits situation. You advise the client to obtain a claim form to protect her potential date of claim and offer details of services that can offer help to the client and her neighbour.

### **Type Four - Advice with casework**

Includes all elements of an advice service and also involves taking action on behalf of the client to move the case on. It could include negotiating on behalf of the client

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<sup>2</sup> As published within the Welsh Government’s Information and Advice Quality Framework for Wales.

with third parties on the telephone, by letter or face to face. It will involve the advice provider taking responsibility for follow-up work.

E.g. a student is having difficulty in negotiating the return of their damage deposit from a local landlord. You contact the landlord and explain that you will be supporting the student to recover the maximum value of the deposit. The landlord claims there was damage to the property which the student later accepts. You negotiate a reasonable deduction for the damage.

### **Type Five - Specialist casework**

Describes services where the adviser or the service as a whole undertakes advice and casework at a level where very detailed knowledge of the law and case law is required. Usually this means that it is delivered by advisers who have the necessary depth of legal knowledge and expertise to undertake representation for clients through the court or tribunal.

E.g. the client has lost a first-tier social security tribunal. Your adviser identifies an error of law in the tribunal's decision that they will go on to argue before the Upper Tribunal. Their arguments will reference legislation and case law.

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