

# Candidate Brief



## Eltham United Charities

### Clerk to the Trustees

**AC0402**

**June 2025**

**Managing Director**  
Sarah Thewlis  
[sat@thewlisgraham.com](mailto:sat@thewlisgraham.com)

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## Welcome letter from The Board of Trustees

Dear Candidate,

We are delighted that you have expressed an interest in applying to be the Clerk to the Trustees for Eltham United Charities. We hope this candidate brief gives you all the information you might need regarding the requirements of this role. More information can be found on our website: <https://elthamuc.org.uk/>.

Eltham United Charities provides almshouse accommodation for nineteen elderly, retired residents of Eltham and Mottingham on restricted incomes. The Charity was formed in 1907 through the amalgamation of ten older charities some of which were established in the 1500s. The Charity is funded in part from income from our extensive property portfolio.

We are seeking an innovative, flexible appointee with a track record of successful change management to support the Trustees and drive the organisation forward. The successful candidate will support the Trustee body in the fulfilment of the Charity's aims and objectives and oversee the operational aspects of the Charity to ensure an efficient and effective operation. The Clerk is also responsible for overseeing the Charity's financial records and asset register.

If this is a role that interests you, we would very much like to receive your application. You can find all the details on how to apply further along in this brief. If you have any further questions about the role once you have read this candidate brief please contact us by email: [applications@thewlisgraham.com](mailto:applications@thewlisgraham.com) for a confidential conversation with Sarah Thewlis.

Kind regards,

The Board of Trustees

## **2. About Eltham United Charities and Almshouses**

### **Our History**

Eltham United Charities was formed by the Charity Commission on 9 July 1907 when ten local charities based in the parishes of Eltham and Mottingham, all of which had similar aims, namely the welfare of retired parishioners on restricted incomes, were amalgamated.

In 1964 the old almshouse in Eltham High Street was demolished and new accommodation consisting of sixteen units, known as Fifteenpenny Fields, was built behind Blunts Road on land owned by one of the original ten charities. In 1987 there was a further development, known as Thurland House, fully funded by a local resident, consisting of two double units plus accommodation for the Resident Estate Manager.

Currently, after further building alterations, the Charity is able to provide nineteen units, mostly on the ground floor, for independent living and a guest room. Mainly due to the generosity of wealthy residents of Eltham and Mottingham from the fifteenth to the nineteenth century the Charity has sufficient income to cover the running costs of the almshouses without the need to fundraise.

The almspeople appointed must be able to look after themselves, be on a restricted income and have a long-standing connection with Eltham or Mottingham. The accommodation is free of rent, heating and maintenance.

There remains a strong community spirit and both the Trustees and Resident Estate Manager support ensures the residents retain their dignity, freedom and independence by allowing them to live their lives as they see fit within a safe and secure environment.

Eltham United Charities has a board of nine Trustees, of which three are appointed by the Royal Borough of Greenwich and six co-opted by the board from the local area. There is a strong community spirit amongst the almspeople, well supported by the Trustees, the Clerk and the Resident Estate Manager.

### **Our Purpose**

The principal object of the charity is to provide free accommodation for retired persons on restricted income who reside in the parish of Eltham and Mottingham.

### **Our Organisational structure**

The management of the charity is the responsibility of the Trustees who are elected and co-opted under the terms of the Trust deed dated 9th July 1907 and subsequent amendments. Currently our Charity has 9 Trustees, the Clerk and the Resident Estate Manager.

## **Our Future plans**

Almshouse charities have to invest heavily in the modernisation and updating of almshouse dwellings to provide 21st century living. Standards of accommodation are continually rising, with technology playing an increasing part in making life easier. Disabled access, internet connection, electronic doors and sophisticated alarms all contribute towards enabling residents to remain independent in their homes for as long as possible.

The Trustees aim is for the charity to continue the maintenance of the almshouse and to maximise occupancy of the units as well as review the property portfolio and refurbish where necessary.



### 3. Job Description and Person Specification of the Clerk to the Trustees

Job Title:	Clerk to the Trustees
Reports to:	The Board of Trustees
Responsible for:	Resident Estate Manager
Location:	Eltham, South East London
Working hours:	The equivalent of 25 hours per week
Contract:	Permanent
Salary	£35,000

#### Purpose of the role

1. The charity is in a period of transition and many of our policies and procedures are in need of updating. Trustees need support in moving the organisation forward. We are seeking an innovative, flexible appointee with a track record of successful change management to drive the organisation forward.
2. To support the Trustee body in the fulfilment of the Charity's aims and objectives.
3. To oversee the operational aspects of the Charity and ensure an efficient and effective operation.
4. To oversee the Charity's financial records and asset register.

#### Governance

- Agree the agenda with the Chair and circulate before meetings, together with supporting papers, which will include reports on the Charity's property portfolio and on the Charity's finances.
- Take minutes of meetings, send the draft to the Chair and when agreed circulate to the Trustees.
- Advise the Trustees on the nature and extent of their duties and responsibilities.
- Keep a register of policies and review them as agreed by the Trustees. Create new policies and update existing policies as necessary.
- Keep a risk register, review it at least annually with the Chair, and submit it to the Trustees for their adoption.
- Keep a register of Trustees that includes their declared interests.
- Submit the details of new and retiring Trustees to the Charity Commission.
- Submit the annual return to the Charity Commission, which will include the annual report and accounts.
- Keep abreast of any new Charity Commission requirements and advise the Trustees accordingly.
- Notify Trustees about any training available.
- Ensure the effective induction of newly appointed Trustees.
- Ensure that the Charity is legally compliant with, amongst other things, health and safety requirements and data management (GDPR).

## **Residents and applications from prospective residents**

- Periodically contact each resident to check that all is well with them.
- Deal with queries and concerns raised by residents.
- Liaise with the Resident Estate Manager on residents' welfare concerns.
- Offer advice to residents in need.
- Check on new residents after they have moved in and advise them on how they may access benefits.
- For new applications undertake the first sift and support the Trustees in all the appointment processes.

## **Finance**

- Update the Charity's financial procedures making use of appropriate systems and technology.
- Keep up-to-date financial records of income and expenditure over all accounts and reconcile the statements in collaboration with the Charity's accountants.
- Set up payments for invoices.
- Act as the first point of contact with the auditor and submit any and all required information.
- Prepare an annual budget and forecasts.
- Prepare the draft of the annual report.
- Submit the annual accounts to the Charity Commission and to Companies House.

## **Property**

(In addition to the Pennyfields site, the Charity has a substantial property portfolio).

- Concerning works at the almshouses, liaise as appropriate with the Resident Estate Manager and jointly organise works as required. Obtain approval from the Trustees for works above the set cost limit.
- Ensure that a Quinquennial Survey of the almshouses is undertaken.
- Concerning the Charity's property portfolio outside the almshouses, contribute to the design of a strategy to manage the properties owned by the Charity.

## **General administration**

- Work with the existing clerk to ensure an efficient handover.
- Work closely with the Resident Estate Manager providing adequate leadership to ensure the smooth running of the Almshouses.
- Assist with the setting up of an office on the Pennyfields site.
- Deal with letters, correspondence and other reasonable duties, as requested by the Trustees.
- Ensure the renewal of insurance, including management liability insurance.
- Keep abreast of the guidance of the Almshouse Association and share it with the Trustees.
- Review training offers from the Charity Commission and the Almshouse Association and, where relevant, share it with the Trustees.
- Attend relevant training.



- Understand the implications of the Equality Act with particular attention to disability requirements and reasonable adjustments.
- Take responsibility for the overall management of the Charity's website. Review the website, confer with Trustees regarding the updating and changes and arrange for updating and changes to the website to be implemented as required.

The above list is not necessarily descriptive of all duties and it does not restrict flexibility. It is an express condition of your employment that you are prepared to assist in other areas of the business, and you may be required from time to time to perform other duties according to the requirements of the business and that are within your skills and competence.

### **Person Specification**

The Clerk should possess the following skills and qualities:

- Experience of managing change and innovation in a similar environment.
- Empathy with the aims of the Charity. An understanding of charity governance.
- Prior clerical/administrative experience.
- Sound communication skills to enable efficient liaison with Trustees, residents and professionals providing services to the Charity.
- Proficiency in the use of computer software, for example Microsoft Word, Excel, Outlook and accounting software.
- Experience of managing finances.
- Familiarity with websites.
- Experience of drafting policies and procedures.
- Experience of commissioning advice on health and safety.
- An ability to work well with a range of people.
- An ability to work under pressure and be a good team player.
- Problem-solving skills and open-mindedness.
- Excellent verbal and written skills.
- A willingness to learn new skills.



## **4. Salary and Benefits**

### **Salary**

The salary offered is £35,000 per annum subject to review.

### **Holiday**

25 days paid holiday per annum.

### **DBS checks**

Appointments to the post are subject to a criminal record check (DBS check) which will be renewed at least every five years. This post is also subject to a six-month probation period.

*If you have read all this information and still have a query, for a confidential conversation with Sarah Thewlis, Managing Director of Thewlis Graham Associates, please contact us via email [applications@thewlisgraham.com](mailto:applications@thewlisgraham.com).*

## 5. Timeline, Application Process and How to apply

### Timeline

Dates	Activity
6 August 4pm	Closing date for applications.
W/C 11/18 August	Thewlis Graham consultant interviewing of interested candidates – online.
W/C 15 September	Eltham United Charities Interview.

### Application Process

Thewlis Graham Associates will acknowledge all applications. These will be assessed against the criteria in the Job Description and Person Specification section and the people who best meet these will be invited for interview with Thewlis Graham online.

Those candidates not invited to interview will be advised by email.

Longlisted candidates will be advised by email. After a consultation between Eltham United Charities and Thewlis Graham Associates a Shortlist will be drawn up and Shortlisted candidates invited for interview with the client.

### How to apply

To apply for this position, please complete the three steps below, emailing your documentation to [applications@thewlisgraham.com](mailto:applications@thewlisgraham.com) quoting reference **AC0402**.

1. Your CV in Word format only.
2. Your covering letter in Word format only, to cover the following points:
  - Your reasons as to why you would consider yourself suitable for this role, and why you are interested in the role.
  - Your current remunerations details and notice period and the name, job title, organisation, email address and mobile number of two professional referees. (Please note referees will not be approached without your prior permission).
  - Please keep the letter to a maximum of three pages in total.
3. Please complete the Diversity Monitoring form, please see link below.

**Please ensure that you include your mobile phone number and email address in your application.** Do not hesitate to contact Sarah Thewlis via email [sat@thewlisgraham.com](mailto:sat@thewlisgraham.com) if you have any queries.

***If you would prefer to receive this candidate brief in a more accessible format, please contact us.***

## 6. Diversity and Inclusion Monitoring

Diversity and inclusion monitoring is independent of the recruitment process but please do send a completed form with your application. Thewlis Graham Associates is committed to monitoring and analysing diversity information so that we can ensure that our processes are fair, transparent, promote equality of opportunity for all, and do not have an adverse impact on any particular group.

The link to this form is here: [click here](#). If you have any problems with this, please contact Lizzy via email: [lt@thewlisgraham.com](mailto:lt@thewlisgraham.com).

Any information provided on this form will be treated as strictly confidential and will be used for statistical purposes only. It will not be seen by anybody directly involved in the selection process. No information will be published or used in any way which allows any individual to be identified.

Thank you.