



C J GALLARD'S
— ALMSHOUSES —

Clerk & Treasurer to The Trustees

Application Pack January 2025



C J Gallard's Almshouses – The Charity

The C J Gallard's Almshouses Charitable Trust (Registered Charity number: 209787) was established in 1906 in accordance with a bequest of the late Mr Charles J Gallard, a Tunbridge Wells businessman and Chairman of Southborough Council.

Mr Gallard's wish was for the provision of 20 flats for the purpose of housing elderly and needy persons from the Southborough area. Construction of the flats commenced in 1911 and they were first occupied by beneficiary residents on 23 October 1912. The site was expanded in 2012 and there are now 25 flats.

The area of benefice was expanded in August 2006 to include the town and parishes covered by the Borough of Tunbridge Wells, but with preference being given to applicants from Southborough and High Brooms

The Trust is a non-profit making charity, controlled by the Charity Commission. The Charity's Trustees, who give their services voluntarily, are responsible for administering the Charity and the appointment of beneficiary residents when vacancies occur.

The Almshouse flats provide accommodation on two floors and are unfurnished dwellings. The aim is to provide quality accommodation in a setting which allows residents to come and go as they please. Residents are encouraged to make friends, sharing in a social life through use of the communal facilities. There is an emergency telephone call system in each flat so that in case of need, such as sudden illness or after a fall, residents are able to obtain help quickly.

However, residents must be able and willing to live independently. Subject to this, it is the Trustees' policy that residents are normally able to remain at Gallard's as long as they wish.

Governance & Management

C J Gallard's is an unincorporated charity run by a group of Trustees. The Trust is a Registered Charity governed by Schemes made by the Charity Commission having as its principal object the management of the properties known as the C J Gallard's Almshouses. Applicants for our

flats have to be men and women of limited financial means over the age of 55 years who have resided in the Borough of Tunbridge Wells with priority given to applicants from Southborough. The Charity is financed by Weekly Maintenance Contributions (“WMC”) from the residents, income from Investments and Ark Community Room lettings and donations. The Trust is administered by a body of up to nine Trustees which include the Vicar of St Thomas’s Church, Southborough, two persons nominated by the Tunbridge Wells Borough Council, one nominated by the Southborough Town Council and five persons who have resided or carried out business in or near Southborough.

The Trustees meet regularly as a board, approximately 6 times a year. There are a number of sub committees: Finance and Maintenance, Policy and Compliance, Residents Applications and Gardening. The Clerk to the Trustees and an Almshouses’ Manager carry out day to day administration and management of the Almshouses’ flats and estate; the Clerk also ensures that the Charity is properly managed financially and is responsible for all areas of finances with the exception of investments.

The charity is financially sound and the annual accounts are available on the Charity Commission Website at www.charity-commission.gov.uk (charity number 209787)



Location

C J Gallard’s is situated in Southborough, which is a small suburb of Tunbridge Wells. Royal Tunbridge Wells is a large affluent town in western Kent, England, about 40 miles south-east of central London by road, 34.5 miles by rail. The town is close to the border of the county of East Sussex. Local Transport links are good, with trains and buses serving the area well.

Further information

Please see our website – www.gallards.co.uk.

January 2025

Dear Applicant,

Thank you for your interest in the position of **Clerk and Treasurer** to the Trustees at C J Gallard's Almshouses. The Trustees of Gallard's welcome applications for the position of Clerk & Treasurer to the Board of Trustees which becomes available on 1 April 2025 following the retirement of Mr Phil Grainger, the current postholder.

We provide good quality accommodation for those in need, in and around the Southborough area. Our properties are well maintained and we have a 5 year rolling plan to ensure our properties are comfortable living spaces for all our residents. Over the years we have been able to make significant investment in our infrastructure and facilities, but of course facilities are nothing without the right staff team.

I look forward to receiving your application which should be accompanied by a covering letter stating what attracts you to this post. Shortlisted candidates will be given the opportunity to visit the Almshouses but if you wish to visit before submitting your application, please contact the current clerk, Phil Grainger, via email at clerk@gallards.co.uk.

Yours sincerely

N Powell

Nick Powell
Chair of Trustees

JOB DESCRIPTION

Position: Clerk & Treasurer to the Trustees

Purpose: The role of Clerk to the Trustees is to be: the first point of contact for all external enquiries; responsible for administering the charity's affairs, including its finances; responsible for controlling the office and systems; circulating information; ensuring the properties are repaired and maintained appropriately: as well as the point of contact for the Trustees.

Hours: 20 per week. Whilst we welcome flexible/hybrid working, 50% of these hours must be on site to help build relationships with both the manager and residents.

Reports to: Responsible to the Trustees

Reportees: Almshouses' Manager, Assistant Manager, Handyman and any other employees of the Trust.

Key Responsibilities:

- Prepare, in consultation with the Chairman, agendas, notices of meetings and minutes of meetings (i.e. Full Trustees, M & F and PACS), service the Trustee Body or any duly appointed sub-committees or working groups, circulate minutes of meetings and deal with correspondence on matters arising and the administration of the Charity and Alms houses.
- Write and circulate reports and recommendations for consideration by the Trustees at their meetings.
- Have a monthly zoom meeting with the Chair, Vice Chair and the Manager.
- Be familiar with legislation concerning Employment, Health & Safety, Fire Safety, Data Protection and any other matters relevant to the care of older people in supported housing and any other appropriate matters, advising the Trustees and ensuring changes are reflected in policies and the advice given to residents, and implementing policies agreed by the Trustees.
- Maintain records of the Weekly Maintenance Contributions ('WMC') and other income, reporting any arrears to the Trustees and advise on periodic reviews of the amount of the WMC.
- Be responsible for staffing and personnel matters, as directed by the Trustees. This may include recruitment, taking up references, issuing contracts of employment, terms and conditions of service, welfare matters and ensuring a grievance procedure is available, and a discipline and dismissal policy are in existence. Manage the team of employees at the Trust including the arrangement of staff training and handle disciplinary matters in accordance with the Charity's policy and procedures.
- Calculation of salaries and/or wages, using Quick Books payroll package, arranging for such to be reviewed annually, and reports to HMRC relating to tax & national insurance contributions.
- Implement Health & Safety policies and procedures.
- Make visits, when requested by the Manager, or contacted directly by them, to residents to discuss their welfare or any other issue on which they need advice, including benefits, such as Housing, domiciliary and home care. To be able to access advice on such matters through the appropriate third parties such as Age UK and CAB. (Keep the Trustees informed as appropriate).
- Maintain suitable accounts. Carry out or supervise the banking of cash or cheques. Maintain a proper record of monies received and banked and all monetary transactions, and liaise with the Lead Trustee on Finance when required.

- Prepare an annual budget of potential income and expenditure for the Trustees' approval and report against budget to Trustees' meetings.
- Produce paperwork for the Charity's accountant so that annual Financial Statements can be prepared.
- Issue petty cash to the Almshouses' Manager as required and monitor its expenditure, incorporating figures into the bi-monthly reports to Trustees' meetings. Carry out occasional spot checks of the petty cash held by the Almshouses' Manager.
- Complete annual returns to the Charity Commission including the lodgement of Financial Statements.
- Liaise where necessary with all banks, mortgagees, chargees and other like institutions which have some financial stake in the Charity providing them with such information, including annual Financial Statements, as they require.
- Report to the Trustees on the state of repair of the Almshouses and deal with routine maintenance, including relationships with contractors and engaging new contractors when required. When Almshouses fall vacant, arrange for such internal decoration and/or repairs as are necessary and for cyclical maintenance as approved by the Trustees.
- Ensure the Manager maintains a record of maintenance work carried out on the estate.
- Instruct professional consultants, on advice from the Trustees, to carry out Quinquennial Inspections, advise the Trustees on extraordinary repairs, major refurbishment and capital expenditure with further advice on payment for such works, where appropriate.
- Advise the Trustees on the availability of statutory grants and other sources of funding.
- Deal with an annual review of insurance cover, in consultation with insurance brokers and as authorised by the Trustees.
- At least annually review investment policies, taking specialist advice as necessary.
- Advertise flat vacancies in accordance with the Governing Document, arrange for application forms to be sent to those who enquire and arrange for interviews (including home visits) by the Trustees in order that they can make the new appointment(s). Complete references following applicant interviews and inspect financial & other paperwork to check status of applicant prior to issuing licence.
- Liaise, as appropriate, with the Almshouse Association, Charity Commission and other bodies to further the best interests of the Charity and to keep the Trustees and employees of the Charity aware of current policies, procedures and best practice.
- Take responsibility for drafting and implementation of, subject to Trustees' approval, policies on all matters as required by current legislation and the terms of the Charity's Governing Document.
- Assist with the process of Gallard's changing its status to become incorporated.
- Ensure that the Charity receives an efficient service under the terms of any contractual arrangements with other organisations, associations or managing agents, including the lift service company and telecare provider.
- Incur expenditure on behalf of the Trustees in line with the Expenditure Authorisation policy, and recorded in the minutes of a Trustees' meeting.
- Monitor appointment terms of Trustees and arrange for reappointment as required, in consultation with the Chairman.
- Monitor Ark hirings arranged by the Almshouses' Manager, issue invoices where required and arrange licences for new hirers as well as checking their insurance cover annually.
- Keep website up to date as required by liaising with appropriate third parties.
- Any other responsibilities or duties as considered appropriate and requested by the Trustees and acceptable to the Clerk by mutual agreement.

This is not a contractual document and may be changed from time to time to meet the needs of the Employer.

PERSON SPECIFICATION

Below is an outline of the key skills and qualities that are required for the role:

Essential

- Experience of administration and record maintenance.
- Basic accounts and payroll experience. Quick Books knowledge helpful.
- Experience of minute taking and serving committees.
- Excellent organisational skills, including ability to juggle tasks and work within tight deadlines.
- Computer literate, basic typing skills, able to use Microsoft Office systems word processing, excel spreadsheets, emailing and internet facilities.
- Ability to work flexibly and to use own initiative.
- Ability to work with a range of individuals and demonstrate empathy with older people.
- Good verbal communication skills, including a friendly and professional manner.
- Willingness to work unsocial hours and travel locally as necessary.
- Good clear writing skills.
- Experience of managing a small team.

Ideal

- Recognised financial qualification or equivalent.
- Understanding of property maintenance or willingness to learn.
- Understanding of the charity legal framework.

The salary will be dependent on experience and will be commensurate with the level of responsibility for this role. This job description is not intended to be all embracing and the post holder shall be required to carry out other duties as necessary and required, commensurate with training and experience. C J Gallard's reserves the right to amend this Job Description from time to time according to business needs. Any changes will be confirmed in writing.

ADVERT FOR On-Line Recruitment Sites and/or Local Papers

The Post

The Trustees invite applications for the post of Clerk and Treasurer to The Trustees which falls vacant at the start of April 2025.

The Clerk is responsible for the financial and business affairs of the Charity (including payroll and regulatory compliance), the facilities, buildings and estates, and the management of the support staff.

The successful candidate will be an experienced administrator and ideally have financial or accounting qualifications, with relevant financial experience, and first-class leadership, administrative and communication skills.

The role requires a strong ability to work as part of a team and to participate fully in all aspects of our Charity.

This is a part-time, permanent role. Salary is dependent on qualifications and experience although is likely to be in the region of £18,700 (equivalent to £18 per hour)

Prior experience in the charity sector is not essential and applications are encouraged from candidates with commercial, charitable and public sector backgrounds.

For any queries, please contact the Clerk by email at clerk@gallards.co.uk.

Applications

The application form must be completed in full and should be accompanied by a letter, in which the applicant should set out their rationale behind making this application and should go on to discuss the skills, strengths, enthusiasms and experience that they can bring to the post, without necessarily repeating the information already supplied on the application form.

Candidates should send/email their completed application form/CV to Nick Powell, Chair of the Trustees, together with a covering letter. Completed application forms/CV and covering letters (both as PDF files if sent electronically please) should be emailed to Phil Grainger, Clerk at Clerk@gallards.co.uk or posted to the Charity's address, marked for his attention.

The process is as follows: All applications will be acknowledged by email. If you have not received acknowledgement that your application has been received within two working days of sending it, please contact the Clerk.

Deadline for applications **Friday 7th February 2025** at noon.

Short-list interviews will take place at Gallard's on **either 24th or 25th February 2025**.

Candidates are encouraged to apply as soon as possible. We reserve the right to interview as and when applications are received, ahead of the closing date and withdraw this advert. You are therefore encouraged to apply promptly. Costs for travel are not covered.