



# Shepton Mallet United Charities

[www.aims1627.org.uk](http://www.aims1627.org.uk)

*Registered Charity Number 1175666*

*Registered Housing Association Number 5142*

*Registered Office: tba*

**ROLE: CLERK**

**THE AIM OF THE CHARITY** is to provide social housing in the form of almshouse accommodation for the benefit of older or disabled persons resident in Shepton Mallet and the surrounding area who are in need or experiencing hardship or distress; also to undertake such charitable purposes for the benefit of the residents in the almshouses in such manner as the charity trustees think fit from time to time.

**KEY PURPOSE OF ROLE:** To assist the Trustees in carrying out their responsibility for good management and administration of the almshouses. The Clerk will be the principal recipient of correspondence or other communications relating to the Charity from other agencies, institutions or individuals and will distribute or direct these to the Trustees and/or file the material accordingly. The Clerk will also act on instruction by the Trustees to prepare, distribute, communicate and/or file such material as is generated by them in the course of their activities in the management and administration of the almshouses.

**LOCATION:** Working from home, with quarterly trustee meetings at selected locations in Shepton Mallet.

**REPORTING TO:** The Chair

**ACCOUNTABLE TO:** The Chair, Vice Chair(s) and Treasurer

**REPORTING STAFF:** None

**HOURS OF WORK:** Seven and a half contracted hours per week. Variable such hours as the work demands over the course of a year (390 contracted hours including holidays).

**KEY RELATIONSHIPS:** Chair, Vice-Chair(s), Treasurer. Trustees. Warden and almshouse residents.

**CLERK DUTIES:**

**General  
Administration**

- In order to service the trustee body or any appointed sub-committee: preparing agendas and notices of meetings, organising room bookings and other facilities, attending meetings, taking minutes and circulating them, and dealing with any correspondence arising from these.
- Setting up and maintaining a filing system for retaining documents and other material necessary to ensure the smooth operation of the Charity, and for keeping an historical record of its activities.
- Collating and recording information in accordance with GDPR.
- Circulating reports, papers and other communications to the trustees as appropriate.
- Reviewing and updating as appropriate the Residents' Handbook.
- Charity Commission:
  - Being the main administrative contact
  - Filing annual return upon trustees' approval
  - Filing annual report and accounts upon trustees' approval.
- NROSH:
  - Being the main administrative contact
  - Filing annual return upon trustees' approval
- Almshouse Association:
  - Being the main administrative contact
  - Keeping trustees informed of any key developments, including legal changes which may affect the Charity
- Insurance:
  - Being the main administrative contact
  - Handling annual renewals with agent
  - Informing trustees of insurance cover and payments
  - Liaising with Treasurer regarding payment
- TV ARC Licensing:
  - Being the main administrative contact
  - Handling annual renewals for applicable residents
  - Liaising with Treasurer regarding payment

	<ul style="list-style-type: none"> <li>• Undertaking any other administrative duties as the Chair may from time to time require</li> </ul>
<b>Resident Matters</b>	<ul style="list-style-type: none"> <li>• Contact: being the first point of contact for residents (by phone, email, voicemail, answerphone etc) for issues, complaints and concerns</li> <li>• Records: maintaining annually updated details of residents' telephone, age, next of kin, GP and family</li> <li>• Financial Status: sending annual letters to residents (after review with Treasurer)</li> <li>• Weekly Maintenance Charges (WMCs): sending annual letters to residents (after review with Treasurer)</li> <li>• Almshouse Vacancies: <ul style="list-style-type: none"> <li>○ Reading gas/electric meters upon vacancy and new occupation, and liaising with Treasurer regarding readings and payment</li> <li>○ Advertising vacancies, receiving applications for the appointment panel, and dealing with any other related correspondence</li> </ul> </li> </ul>
<b>Financial matters</b>	<ul style="list-style-type: none"> <li>• Providing support the Treasurer may request</li> <li>• Passing any purchase invoices and financial statements received to the Treasurer for recording and payment</li> </ul>
<b>Key</b>	<p><i>ARC: Accommodation for Residential Care</i>  <i>NROSH: National Register for Social Housing</i></p>

## **PERSON SPECIFICATION**

The Clerk should possess the following skills and qualities:

- Prior clerical / administrative experience.
- Proficiency in use of computer software, e.g. Microsoft Word, Excel and Outlook.
- An ability to work well with a range of people.
- A willingness to learn new skills.
- An ability to work under pressure and be a good team player.
- Problem-solving skills and open-mindedness.
- Excellent verbal and written skills.