

Clive Richards  
Foundation  
Making a Difference

**ADMINISTRATION & FINANCE ROLE**

The Clive Richards Foundation is looking for a conscientious individual who is highly organised and self-motivated, to support the Chief Executive, Trustees and manage the day-to-day operations.

The role is permanent, part-time 3 days a week/0.6FTE.

Hours & Location: 9am-5pm with 30 minute lunch break.  
Office based at Lower Hope, HR1 3JF. Flexible hours are possible.

Salary £35,000 to £40,000 **pro-rata** depending on experience.

Deadline for application 9am Tuesday 27 August 2024.

The purpose of this role is to provide comprehensive administrative & some finance support to the Foundation. This requires excellent skills in word processing, spreadsheets, managing electronic communications, dealing with telephone enquiries, filing and maintaining records. You should be highly organised, self-disciplined, very accurate, and adaptable. You will be the first point of contact and must be articulate, polite, courteous and helpful.

Good working experience of Word, Excel, Adobe PDF, Outlook & Zoom is essential. We currently use QuickBooks accounting software (training will be given, if required). Knowledge of CRM system would be useful.

Administrative duties include recording and processing all applications, collating and circulating information to Trustees, or relevant groups, including papers for Stage 1 meetings (held every four to six weeks) and Board meeting papers (every 2 months), via Dropbox or OneDrive. Printed papers are also needed for some Trustees.

When required, you will attend the board (and other) meetings to represent the administration and finance department.

The role includes secretariat support for Board and other meetings, including organising meeting agendas, minute taking, and sending out relevant papers, etc.

Additionally, you will have a good working knowledge of Data Protection, IT security, and other relevant legislation, including compliance with Charity Commission and Companies House requirements.

The finance aspects of this position require the ability to maintain accurate and detailed records of income and expenditure, and to provide year-end information to the auditors. You will manage donations to the Foundation and make Gift aid claims on its behalf. Financial records are maintained in QuickBooks software, supported by Excel spreadsheets. Relevant training will be given but a minimum basic knowledge would be helpful.

Additionally, a specialist broker independently manages the Foundation's investment portfolio. The investments are recorded in the Foundation's accounts and regular contact with the broker is part of this role.

Prior to each board meeting the Trustees receive up to date analyses of income and expenditure, including grants made and approved for payment, and cashflow projections.

Details of the Foundation's investment portfolio are also included in the periodic finance pack to Trustees.

We do not raise or receive any funds from outside activities. All monies have been provided to the Foundation by Mr Richards from investments and business activities, and also gifts from Mrs Richards. Apart from Gift Aid, the Foundation gets no funding from elsewhere.

### **What you will need:**

It is absolutely essential that you have a good sense of humour, are self-motivated, articulate, flexible and have a keen eye for detail. We operate and run the Foundation closely, as a very small team.

Experience of undertaking varied and general administrative tasks and finance responsibilities in a charity or commercial organisation.

Effective people skills including assisting with telephone enquiries.

Strong time management skills with the ability to prioritise work with competing demands.

An accounting qualification (such as AAT) is desirable but not essential.

It would be helpful if you have IT skills, including website content creation and updating (WIX), and database management.

Training and mentoring will be given for all relevant aspects of this role but you need to have very good administration and organisational skills to cover the duties required.

As a guideline the duties are roughly split 90% administrative and 10% finance.

We strictly operate a 'no smoking' policy at Lower Hope over the entire Estate.

## **OVERVIEW OF THE CLIVE RICHARDS FOUNDATION**

There are nine voluntary Trustees including the co-Founder and the Chair, 1 Chief Executive, 1 Charity administrator and 1 Finance manager. All salaried positions are part-time.

Individual Trustees represent specific areas of fund giving, for example education, overseas, medical, the arts, and alumni.

The main board of Trustees meets every 2 months to discuss new applications from the UK and overseas. Currently the Foundation is closed to overseas applications but there will be occasions where they are temporarily opened again for short periods of time (perhaps twice a year). The Foundation has a good relationship with approximately 7 overseas charities, and we tend to focus our main fund-giving to them with a nominated Trustee taking the lead on this.

UK Organisations based within 50 miles of the Foundation's office are invited to make an application to us and may be invited to give a presentation to the Trustee board if the application amount is significant (currently £50,000 and above).

The Stage 1 meetings take place every four to six weeks to review initial applications against our funding criteria; those that meet the criteria are taken to the Stage 2 (the full Trustee board). The Stage 1 meeting can award smaller donations of up to £1,500 without further approval from the main board.

For Stage 2 applications, the Chief Executive reviews and visits the relevant organisations to discuss their proposals before the applications are put to the Trustees to discuss.

All applicants are notified of the board's decision and results, usually within two weeks of the board meeting.

Financial payments are processed in line with the Trustees' instructions.

It is critical to ensure that the Foundation spreadsheet of applications is kept fully up to date throughout with decisions and action points as they occur. In the future this may change to a database.

Whilst we are relatively speaking, a small charity, we keep meticulous records.

We offer equal employment opportunities for all applicants and employees, regardless of race, religion, gender, national origin, age, disability or marital status.

## **HOW TO APPLY**

Caren will be collating all applications via [job@cliverichardsfoundation.com](mailto:job@cliverichardsfoundation.com) This should be the only email address you use in relation to your job application. Please add this address to your safe sender list.

Please send a covering letter telling us why you feel you are suited to this role, together with your up-to-date CV. References will only be required after any interview. At this stage do not send details of any certificates/qualifications etc.

All applications will be treated in the strictest of confidence and no current or ex employer will be contacted without permission before final interviews.

The closing date is Tuesday 27 August 2024 at 9am.

Your application will be acknowledged upon receipt. If you have not received this within 3 working days please resend your application.

You will be informed in due course if you will be invited to interview or not.

Please do not telephone for updates.