



The
EVESON
Trust

Chief Executive Officer

Appointment brief • January 2026

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About us

The Eveson Trust is a Worcestershire-based, place-focused grant-maker born from the bequest of Violet Mary Eveson. With an endowment of approximately £100 million, we currently support an annual grants programme of circa £5 million. In 2022 we modernised our legal framework by becoming a Charitable Incorporated Organisation (CIO), while keeping our local roots and long-term commitment to communities across our region.

Mission and strategic aims

We exist to relieve need and enhance quality of life for people living in Worcestershire, Herefordshire and the metropolitan boroughs of the West Midlands. Our priority is to make meaningful, measurable local impact for: people with physical, sensory or learning disabilities; those with mental-health needs; children and young people in need; older people; people experiencing homelessness; and users of hospitals and hospices.

We aim to:

- use our endowment responsibly to sustain what we fund;
- ensure robust governance and due diligence so funds are well spent; and
- raise our visibility and reach in places where need is greatest but awareness of the Trust is low.

Current organisational position

Governance and Trustees

Our Board currently comprises seven Trustees plus the Bishop of Hereford as an ex-officio member. Monthly grant sub-committees are held comprising of two Trustees, the CEO and the Grants Officer to review, discuss and approve grant applications. There is an investment sub-committee to monitor and oversee the management of the investments.

The Board is committed, detail-focused and well informed. Trustees expect clear evidence and sound reasoning for decisions and welcome a CEO who can lead confidently while constructively challenging the Board where necessary.

Staffing and operations

We operate with a compact, capable team: one full-time CEO and two part-time members of staff (a grants officer and a grants & facilities assistant). We use contracted grants support to increase capacity, but large awards are done in-house. Finance and IT support are outsourced.

As we seek to grow our impact, we will likely need to grow our team to increase capacity, which is already a pressure point. We have decided not to take on new permanent staff so our new CEO can shape the team they need.

We have replaced legacy systems with Salesforce, which now functions as our CRM and grants-management platform. The Trust manages a mix of revenue and capital grants and applies risk-proportionate monitoring to each award.



Grant-making model

- Applications are considered on a rolling basis (no fixed deadlines).
- Eligible applicants must be UK-registered charities; we do not fund unregistered groups or CICs.
- We award revenue (core) grants, project revenue and capital grants.
- We do not fund routine statutory services (unless funding an enhancement), general awareness-raising, or activity outside our geographic or thematic remit.
- Site visits, due diligence and follow-up monitoring are standard; we also maintain a number of repeat grantees, and we have currently three multi-year grants to the University of Birmingham for medical research.

Geographical focus

Our work spans urban and rural need across:

- West Midlands (urban) — Birmingham, Coventry, Wolverhampton and the Black Country boroughs;
- Worcestershire
- Herefordshire

Financial stewardship and investment

The endowment is managed with external advisers and Trustees take a responsible investment approach (including ESG considerations). Our spending policy balances predictability, impact and long-term capital preservation

Leadership transition

Our current CEO, Claire Bowry, will remain in post until 30th June 2026. Trustees are open to a paid overlap/handover to ensure a full and effective handover. The new CEO will be expected to lead the Trust into its next phase - strengthening strategy, profile, operations and regional partnerships.

Our values and ways of working

- **Judicious stewardship:** careful, safe, proportionate risk management.
- **Evidence-based decisions:** data from Salesforce and impact reporting inform strategy.
- **Fairness and transparency:** clear criteria, respectful relationships, consistent decision-making.
- **Local partnership:** understanding regional context and working alongside other funders.
- **Pragmatism:** willing to make informed judgement calls, not bureaucratising unnecessarily.
- **Community-rooted:** balancing legacy with modern practice.



Our new Chief Executive Officer

Challenges and opportunities

Key opportunities

- A strong endowment enabling major strategic funding and multi-year commitments.
- Potential to build regional funder partnerships and co-funding models.
- Significant scope to increase the Trust's visibility across the wider West Midlands.
- Using Salesforce and monitoring to establish a more impact-focused grant strategy.
- Trustees are open to a developing the team where a clear business case is presented.

Key challenges

- Small internal capacity limits strategic outreach, monitoring and partnership development.
- Geographical complexity across rural and urban areas requires careful balancing.
- Variable awareness of the Trust across our geographies.
- Trustees value detail; the CEO must be prepared for rigorous discussion and expectations of clarity.
- Need to maintain vigilance around risk, safeguarding, and regulatory duties, especially where grants involve vulnerable groups.
- Ensuring high-quality monitoring despite limited staff resource.

What success will look like

In the first 12 months

- A clear strategic plan and refreshed grant-making framework agreed by the Board.
- Improved Salesforce reporting, allowing trend analysis, risk tracking and geographic mapping.
- Increased presence in under-represented boroughs (e.g. targeted outreach or partnership meetings).
- A realistic staffing or resourcing plan proposed with a clear rationale.
- Strong working relationships built across all Trustee sub-committees.
- A coherent communications and profile-raising plan in place.

Within 3–5 years

- A more balanced distribution of grants across the whole region, including areas historically less engaged.
- A recognisable public profile as a confident, outward-facing regional funder.
- Better evidence of impact through consistent monitoring and case studies.
- A right-sized internal team or hybrid staffing model supporting the Trust's workload.
- A grant-making portfolio that is strategic, proportionate and aligned with community need.
- A sustainable spending approach balancing ambition with long-term capital protection.





Job description

Job title:	Chief Executive Officer
Salary:	circa £75,000
Reporting to:	Board of Trustees through the Chair
Reports:	Grants Officer, Grants and Facilities Assistant, Bookkeeper

Purpose

The CEO provides overall leadership for the Trust, ensuring its mission is advanced, strategy delivered, and impact deepened. They develop the Trust’s grant-giving approach, strengthen its reach within agreed thematic and geographic priorities, steward assets within delegated authority, and act as the Trust’s principal representative to partners, stakeholders and the communities served. They support and advise the Board, ensuring robust governance, clear information and effective strategic decision-making.

Governance

- Ensure the Trust meets all regulatory requirements and adheres to sector governance standards.
- Provide high-quality support to the Chair and Trustees, enabling effective oversight and long-term strategic planning.
- Lead strategic reviews, including thematic focus, funding approach and impact assessment.
- Oversee development of internal systems, policies and risk management as the Trust evolves.
- Produce reports that enable informed Board decision-making.

Grant-Making

- Lead the overall grant-making strategy, ensuring due diligence, proportionate oversight and alignment with the Trust's priorities.
- Strengthen organisational learning through effective use of information systems, monitoring and review.
- Maintain an informed view of developments in the voluntary sector to ensure the Trust remains relevant and responsive.
- Build and sustain strategic relationships with funded organisations and sector partners.
- Promote the Trust's role regionally and increase reach through targeted approaches to pipeline development.
- Approve grants within delegated financial authority.

Finance

- Provide strategic financial leadership, ensuring strong financial controls, reliable reporting and sound cash flow management.
- Lead annual budgeting and support Trustees in stewarding the Trust's investments in line with policy.
- Oversee preparation of the annual report and accounts and ensure compliance with auditing and regulatory requirements.
- Support the investment sub-committee with high-quality information and oversight.

Information & Technology

- Assess and manage the strategic implications of digital change, data use and cyber security.
- Ensure key systems, including CRM and productivity platforms, remain fit for purpose and suitably supported.
- Maintain oversight of data security and business continuity.

People

- Provide leadership and line management to staff, ensuring clarity of remit, performance oversight and a supportive culture.
- Lead on safeguarding and ensure policies are current and embedded.
- Oversee recruitment and workforce planning.

Communications & External Profile

- Protect and enhance the Trust's profile and reputation.
- Oversee strategic communications, including digital presence and stakeholder engagement.
- Represent the Trust externally and act as an ambassador.

Data Protection

- Ensure compliance with data protection legislation and maintain appropriate policies, systems and oversight.

Other

- Ensure a safe and suitable working environment and compliance with relevant health and safety duties.
- Undertake additional responsibilities commensurate with the role as required by the Board.



Person specification

Experience and knowledge

- Senior leadership experience in a grant-making, charitable, philanthropic or comparably mission-driven setting.
- Strong financial literacy: confident with investments, annual accounts, budgets and risk.
- Practical experience of modern grant processes, due diligence and monitoring.
- Understanding of regional socio-economic issues across Worcestershire, Herefordshire and the West Midlands.
- Experience working with or advising Boards; comfortable preparing high-quality, concise committee papers.
- Background in relationship management, partnerships, or external-facing roles.

Skills

- Strategic analysis and clear judgement.
- Excellent written communication and presentation for Board audiences.
- Ability to use data (e.g. Salesforce reports) to inform analysis and proposals.
- Prioritisation and operational planning within a small team context.
- Stakeholder and relationship-building expertise.

Personal attributes

- Confident, composed and able to offer constructive challenge to Trustees.
- Pragmatic, hands-on, resilient and comfortable working at both strategic and operational levels.
- Curious, outward-looking and motivated to strengthen regional impact.
- Integrity, fairness and a strong commitment to the Trust's values and remit.
- A genuine interest in a long-term leadership role.



Terms of appointment

Job title:	Chief Executive Officer
Salary:	Circa £75,000
Reporting to:	Board of Trustees through the Chair
Reports:	Grants Officer, Grants and Facilities Assistant, Bookkeeper
Hours:	35 hours a week
Place of work:	A minimum of 2 days a week at the Trust’s office, but this must be increased if necessary to effectively manage the operation of the charity. The other 3 days to be used for remote working and charity visits.
Annual leave:	25 days plus bank holidays and a 3-day shutdown over Christmas
Pension:	The Trust runs a pension scheme through Nest and matches employee contributions up to 4%



How to apply

If you would like to apply for the CEO role at The Eveson Trust, please send the following:

- An up-to-date CV outlining your employment history, academic and professional qualifications, and contact details
- A completed Registration Form
- A Supporting Statement (no more than 2 x A4 pages), which:
 - Demonstrates how you meet the criteria outlined in the Person Specification
 - Explains your interest in becoming the CEO of The Eveson Trust

Please submit your completed application to **executive@harrishill.co.uk** to arrive by **9am on Monday 2nd February 2026**.

Timeline

Applications close	9am, Monday 2 nd February 2026
Shortlisting	w/c 9 th February 2026
First-stage interviews (in person at the Trust)	w/c 16 th February 2026
Second-stage interviews (in person at the Trust)	w/c 23 rd February 2026

Please state in your application if you have any commitments during the interview period that may coincide with these dates, or if you require any special provisions should you be called forward for interview.

For any queries or to arrange a confidential conversation, please contact Jenny Hills at Harris Hill (executive@harrishill.co.uk) with your availability.

Advertisement

Chief Executive Officer (CEO) – The Eveson Trust

Location: Worcester (minimum two days per week in the Trust's office; travel across Worcestershire, Herefordshire and the West Midlands)

Salary: circa £75,000

Contract: Permanent, 35 hours per week

Are you a judicious, outward-looking leader who can sharpen strategy and raise the profile of a regionally rooted grant-maker with a significant endowment?

About The Eveson Trust

The Eveson Trust is a Worcestershire-based, place-focused grant-maker established from the bequest of Violet Mary Eveson. With an endowment of approximately £100 million, the Trust supports an annual grants programme of around £5–6 million and in 2022 modernised its legal structure by becoming a Charitable Incorporated Organisation while retaining strong local roots.

We exist to relieve need and enhance quality of life across Worcestershire, Herefordshire and the West Midlands, prioritising support for people with disabilities, mental-health needs, children and young people in need, older people, those experiencing homelessness, and users of hospitals and hospices. Our next CEO will be central to translating stewardship into measurable local impact and sustainable grant practice.

As our next Chief Executive Officer, you will:

- **Strategy & Impact:** lead the development and delivery of a refreshed strategic plan and grant-making framework that focuses resources where they will make the greatest measurable difference.
- **Governance & Finance:** support and advise the Board and sub-committees, ensuring robust governance, high-quality committee papers and sound financial stewardship of the endowment.
- **Operational Leadership:** strengthen internal systems and processes, make effective use of Salesforce, and propose a right-sized resourcing model to deliver the Trust's ambitions.
- **Income & Investment Oversight:** work with the investment advisers and Trustees to balance spending policy, long-term capital protection and responsible investment principles.
- **Community & Partnerships:** build regional funder partnerships, increase reach in under-represented areas and foster strong relationships with grantees and local stakeholders.
- **Grants Quality & Safeguarding:** ensure rigorous due diligence, proportionate monitoring and consistently high standards of safeguarding and risk management.
- **Brand & Profile:** establish and deliver a communications plan that raises the Trust's visibility across urban and rural communities.
- **Team & Culture:** lead, mentor and develop a compact team and oversee high standards in HR, data protection and operational compliance.

Who you are

- A seasoned senior leader with demonstrable experience in grant-making, philanthropy or a closely comparable mission-driven setting.
- Financially literate and confident with investment reports, annual accounts, budgets and risk analysis.
- Experienced in modern grants processes, due diligence and impact-focused monitoring.
- Comfortable advising and constructively challenging Trustees, producing concise, evidence-based committee papers.
- A strong relationship builder with a track record of partnership development and external representation.
- Skilled in strategic analysis, clear judgement and using data (for example Salesforce reporting) to inform decisions.

Why The Eveson Trust?

- A rare leadership opportunity to steward a significant endowment and shape a strategic grant-making approach across a diverse regional footprint.
- A respectful, detail-focused Board and a compact, capable team who value proportionate, evidence-based practice.
- The chance to expand the Trust's presence in under-represented boroughs and to develop meaningful funder partnerships.
- Competitive salary, defined-contribution pension, flexible working and a supportive, mission-focused culture.
- The role offers clear scope to design the team and systems needed to deliver a more impact-focussed future for the Trust.

For full details of the role including how to apply, please download the full appointment brief. For an informal and confidential conversation about this position, please contact **Jenny Hills at Harris Hill** at executive@harrishill.co.uk with times to speak and (optional but appreciated) a CV or professional profile which will be treated with the strictest confidence.

Closing date for applications: 9am, Monday 2nd February 2026

As leading charity recruitment specialists and a certified B Corp, Harris Hill is committed to high and ever-improving standards of equitable and inclusive recruitment. We actively welcome applications from all sections of the community regardless of age, disability, gender, race, religion, sexuality and other protected characteristics.

