Trustee with Finance & Accountancy Expertise

Voluntary Position | Three-Year Term

YORK Conservation TRUST

Our Trust

York Conservation Trust is a unique but significant heritage property trust; operating primarily in York but also within the general confines of North Yorkshire.

Initially established as a private company in 1945, the Trust has operated as a registered charitable company since 1976. Its charitable objectives are to conserve historic buildings in this region, promote public enjoyment of properties under the Trust's ownership and advance education in those traditional heritage crafts required to conserve historic buildings.

The Trust currently owns 70 historic buildings containing more than 150 lettable units, including retail, office, cafe, restaurant, cultural and residential accommodation. The portfolio also includes the following landmark properties; York Theatre Royal, the Assembly Rooms, De Grey Rooms and House, Fairfax House and St Anthony's Hall and Gardens. The income derived from letting these properties is used to deliver the charitable purposes outlined above.

The Trust is managed by a relatively small executive team comprising of four full-time and three part-time members of staff. Trustees bring a range of professional skills and experience to the Board and share responsibility for the Trust's governance, long-term sustainability and charitable impact. Further information about the Trust's structure, activities and current priorities is available on the Trust website: www.yorkconservationtrust.org

Recent Work and Future Direction

Following a strategic review of the estate in 2024, the Trust is undertaking one of the most significant periods of development in its history. Recent projects have brought vacant and underused historic buildings back into productive use, improved the condition and resilience of the estate and increased the income available to support the Trust's charitable work.

The strategic review sets out a clear ten-year plan for investment in the estate. Over this period, the Trust expects to invest substantially in the repair, conservation and adaptation of its buildings. Priorities include completing major projects across the estate, improving environmental performance where this can be achieved without harming historic significance, securing sustainable new uses for complex properties and ensuring that rental income is sufficient to support the long-term conservation demands of the estate. The strategic plan also saw the vast majority of debt removed, which has reduced risk at a time of stubbornly high inflation and considerably improved the Trust's cashflow position.

The Trust also aims to expand its contribution beyond the direct care of its own buildings. This includes supporting traditional heritage skills, encouraging research and innovation, developing educational partnerships and creating more opportunities for people to understand and enjoy York's architectural heritage.

The new Trustee will join the Board at an important point in this programme, helping to ensure that the Trust's ambitions are supported by sound financial planning, effective risk management and responsible stewardship of its resources.

The Opportunity

York Conservation Trust is seeking to strengthen its governance by appointing an experienced finance professional to join its Board as a Trustee/Director. Previous Trustee experience is welcome but is not essential.

The successful candidate will share the same legal and governance responsibilities as every other Trustee while contributing additional expertise in charity accounting, financial reporting, internal controls, investment, treasury and financial risk.

This is a strategic and non-executive appointment. Responsibility for the day-to-day management of the Trust's finances rests with the Chief Executive and Finance Manager who is a qualified and experienced accountant. The Board remains responsible for financial oversight and all significant decisions.

Responsibilities as a Trustee and Company Director

- Ensure that the Trust carries out its charitable purposes for the public benefit and that its activities remain consistent with its governing document.
- Act at all times in the best interests of the Trust, exercise independent judgement and consider the immediate and longer-term consequences of decisions.
- Comply with the Trust's governing document and with applicable charity law, company law and other legal and regulatory requirements.
- Manage the Trust's resources responsibly, protect its property, finances, reputation and other assets, and ensure that significant risks are understood and properly managed.
- Exercise reasonable care, skill and diligence, make appropriate use of personal knowledge and experience, and seek professional advice where required.
- Ensure that the Trust is accountable, well governed and able to demonstrate the impact and public benefit of its work.
- Prepare for and participate fully in Board meetings, contribute constructively to collective decision making and accept collective responsibility for Board decisions.
- Declare and manage actual or potential conflicts of interest, maintain confidentiality and comply with the Trust's policies and standards of conduct.
- Support the Chief Executive through appropriate scrutiny, challenge and encouragement while respecting the distinction between governance and management.
- Act as an informed ambassador for the Trust and support its charitable purpose, reputation and relationships.

The Board would particularly value input into the following areas without assuming individual responsibility for collective Board decisions

- Financial governance.
- Engagement with the external auditor.
- Interpretation of financial information including the review of annual budgets, management accounts, financial forecasts and the Trustees' annual report and financial statements.
- Advice on the application of charity accounting standards including the Charities SORP, and other accounting judgements and technical accounting matters, calling, if necessary, on auditor input.
- Oversight of the development and monitoring of appropriate financial policies, controls and procedures.

- Constructive challenge and support to the Executive Team on financial matters.
- Recommendations to the wider Board on commissioning specialist financial input if required.
- Oversight of organisational risk and the development and review of the Trust's risk register.
- Assistance with the recruitment of senior finance staff.

Person Specification

Essential Skills and Experience

- A recognised professional accountancy qualification or substantial equivalent senior finance experience.
- Strong understanding of reporting, budgeting, forecasting, cash flow, internal controls and risk management.
- Experience of audit and of investment, treasury or borrowing oversight.
- Ability to interpret complex financial information, identify material issues and explain conclusions clearly to non-specialists.
- Ability to provide constructive challenge and maintain effective working relationships.
- Independence of judgement, integrity and an understanding of the distinction between governance and management.
- Commitment to the Trust's charitable purposes and sufficient time for the role.

Desirable but Non-Essential Skills and Experience

- Previous experience as a charity Trustee, Company Director or Board member.
- Knowledge of charity accounting and financial reporting.
- Experience of property investment, asset management, capital projects or substantial property holdings.
- Experience of corporate risk management.
- Knowledge of the heritage, conservation, property or charitable sectors.
- Senior leadership experience in a complex organisation.

Professional Responsibilities

If applicants are professionally qualified, they will be expected to maintain appropriate professional knowledge and comply with the ethical requirements of their profession, including integrity, objectivity, competence, due care, confidentiality and conflict management.

The Trustee's specialist expertise does not reduce the collective responsibility of the Board or involve undertaking the work of staff, auditors or other professional advisers.

Commitment

The Board meets three times each year, usually on a Friday in March, July and November. Meetings are normally held in York and attendance in person is preferred wherever possible.

Including preparation, attendance at Board meetings and occasional work between meetings, the typical time commitment is approximately five to ten days each year. This may vary according to the Trust's activities and the matters before the Board.

The appointment is for an initial three-year term. Any subsequent term will be subject to the Trust's governing document and Board approval.

What You Will Gain from the Role

This appointment offers an opportunity to use your financial expertise to support a unique but well-established charity with a distinctive and nationally significant property portfolio. It is a substantive strategic role, providing direct involvement in major decisions concerning investment, conservation, financial sustainability and the future use of some of York's most important historic buildings.

The successful candidate will gain:

- Board level experience within a small but prestigious property-owning heritage charity.
- Insight into the financial and strategic management of a significant historic estate and major capital investment programme.
- The opportunity to work alongside experienced Trustees and senior professionals from finance, property, heritage and other sectors.
- Broader experience of charity governance, regulation, financial reporting and risk management.
- Professional development through continuing learning and practical governance experience.
- The opportunity to apply their skills to contribute to the conservation of York and Yorkshire's historic and beautiful fabric, ensuring that future generations continue to benefit from the legacy of our predecessors.
- Unique and unparalleled access to our buildings while they are undergoing restoration.

Terms of Appointment

- The role is voluntary and unpaid.
- Reasonable out-of-pocket expenses incurred while undertaking Trust business will be reimbursed.
- Trustees are expected to undertake appropriate induction and continuing development during their term.

Eligibility

The appointment will be subject to confirmation that the candidate is eligible to act as a charity Trustee and Company Director, satisfactory references, completion of the Trust's declarations of interests and eligibility, and any required Companies House identity verification. The Trust welcomes applications from candidates with different backgrounds and perspectives.

How to Apply

Candidates should complete their application using links provided from www.reachvolunteering.ork.uk, the link to this can be found on the Trust's website at www.yorkconservationtrust.org, which also includes additional information about our Trust.

Proposed Timescales

Role advertised from: Friday 11 September 2026

Application deadline: Friday 9 October 2026

Date(s) for interviews: Friday 23 October 2026

Interviews are to be held in person at the Trust's offices in York. Reasonable travelling expenses will be reimbursed.

Reasonable adjustments to timescales may be made during the recruitment process.

Potential Further Commitments Following Interview

As part of the onboarding process, the successful candidate will be invited to sit in on the Board meeting to be held on 13 November 2026. After this, they will be invited to spend half a day with the Trust's executive team to learn more about the Trust, its properties, current work and any relevant technical activity.

Following this, the Chief Executive will issue all relevant information needed to formalise their appointment on the Board. It is envisaged that this process will be completed in late November or early December 2026.

Further Information

York Conservation Trust on the Charity Commission register

The Essential Trustee, Charity Commission guidance CC3

Internal Financial Controls for Charities, Charity Commission guidance CC8

Charity Governance Code

Being a Company Director, Companies House guidance

ICAEW guidance on acting as a Trustee