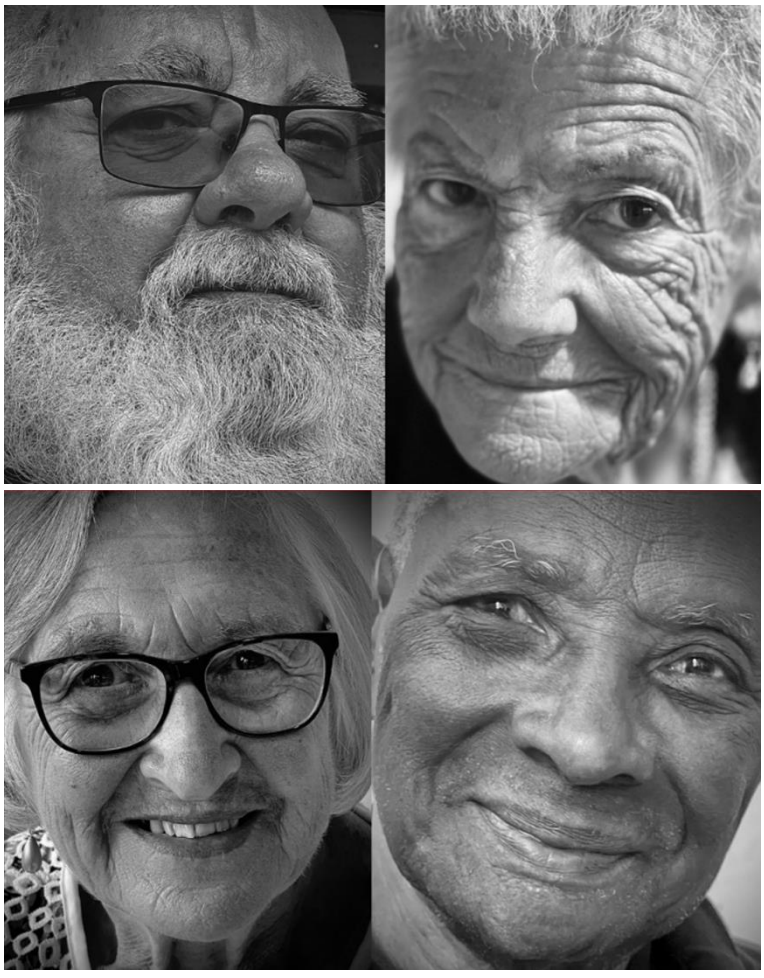
Head of Finance

Recruitment Pack

Closing date: 10.00 am on Tuesday 8 September 2026



Join our team in together making a positive difference to the lives of older people in York and help change how we age.

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Welcome to Age UK York

For over 50 years we have together helped older people, and those around them. Can you join our team to help us be there tomorrow?

Thank you for taking the time to explore our Head of Finance role here at Age UK York. The role leads and manages our wonderful finance team, which as part of our wider support functions, vitally forms the foundations of our charity and by which together we can best support local older people and those around them. We have done much to strengthen our financial resilience over recent years though there is an exciting opportunity to take it forward, bringing your own experiences, expertise and passion to help us continue to make a positive difference in helping others and both shape and sustain our future.

So why Age UK York?

Whilst part of the well-known Age UK national network, Age UK York is an independent standalone local charity. Our focus is ever on York and our city's people and communities.

We believe that an ageing population is a cause for celebration though we also know that too many older people feel marginalised, overlooked and often cannot access the support they need to enjoy a good quality later life. We are here to tackle some of these challenges including loneliness, poverty, social isolation, health and inequalities. We can only do this with robust financial management and helping to safeguard and grow our future to ever be there. Our Head of Finance will be at the heart of helping us to achieve this and shaping our future.

Age UK York is a fantastic place to work. I am so fortunate as our CEO to lead and work alongside our exceptionally talented, compassionate and driven staff and volunteers and I look forward to doing so alongside our new colleague and all we can achieve in helping others.

Please do read on and learn more about the vital contribution you would make to our team

Thank you and we hope to hear from you.

Simon Holmes

Chief Executive Officer | Age UK York

www.ageukyork.org.uk

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Dame Judi Dench | A message from our Patron

We are so grateful for the support of our patron and her recognition of our team and the difference we make together as York's local Age UK.

> Being born in York, our city has been close to my heart all my life.
>
> I am delighted to have the opportunity to become the Patron for York's local Age UK – Age UK York – and support the wonderful difference the charity makes each day in supporting local older people, and those around them, across our city.

Purpose of the role and the difference you make

Our Head of Finance will play a wonderful role in helping our collective efforts in realising our strategy, *One Team, Supporting York* and our aim to be the first port of call for an age-related need in York.

Our Strategy includes six strategic priorities. Our Head of Finance will be crucial in us realising the vital enablers of *strengthening our organisation* and the opportunity of *income generation and sustainability.*

Our local charity is needed as much as ever in supporting Older People as we strive to help tackle the daily challenges increasingly faced by us all as we age. Our Head of Finance will help us address the financial challenges organisations like ours face as we look to be here to help meet the growing need whilst sustaining our charity for the future and the difference we make.

Above: Our Six Strategic Priorities

As a member of our Age UK York Senior Leadership Team (SLT) our Head of Finance will help inform our decision making helping us to make every penny count and to develop, manage and realise our financial goals.

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At its heart, the role will work alongside our people and be involved beyond the numbers and into the needs of York, the role we together make as Age UK York and the stories of those we exist to help. You will complement the strengths of our team bringing an analytical and methodical approach, with excellent attention to detail enhancing our financial management, planning and collective performance.

The role will be an integral part of our team as together we realise our ambitions and shape our future in meeting the needs of older people across York and enjoying later life.

Our Vision, Mission and Values

Together as Age UK York we work towards our shared vision, mission and values.

Our Vision: York is an age friendly city where older people are able to enjoy a life of quality, opportunity, and dignity.

Our Mission: We make a positive difference to the lives of the older people of York.

We do this by putting them, and the people around them, at the heart of all we do, helping older people feel connected, respected and listened to. We work with partner organisations to improve the quality of later life providing effective, timely support for those who need it the most.

Our Values: We are…

- Collaborative
- Inclusive and mutually respectful
- Caring
- Responsive
- Bold and Innovative

Equality, diversity and inclusion

Age UK York is committed to our anti-discriminatory ethos including supporting policies and practices. It is essential that the post holder makes a positive contribution in support of their promotion and implementation.

Head of Finance

Summary

Location	St Edmunds Office, York. YO10 4UX, Role offers office and home hybrid working	**Reports to**	Chief Executive
Hours	21 hours a week	**Working pattern**	Monday-Friday. Nb flexible hours can be considered.
Contract term	Permanent	**Type of role**	Finance / Executive
Responsible for	Finance	**Line Management reports**	• Finance Officer • Finance Assistant

Salary	£17.75 per hour £ 32,391.98 (full time equivalent)	**Holidays**	5 weeks and 1 day plus bank holidays

Responsibilities

Our Head of Finance excitingly leads both strategic and operational financial stewardship across our charity enabling our work in realising our mission to make a positive difference to older people and those around them.

The role will lead the day-to-day financial operations of our charity including managing our team and overseeing budgeting, reporting, audit, payroll and pensions. An integral member of our charity's senior leadership team (SLT) the postholder will work closely with our Chief Executive, Senior team, Trustees and across our teams. The role will support our collective efforts in ensuring the organisation is financially resilient, well governed and positioned to develop our charitable mission over the long term.

Senior Leadership responsibilities (approximately 20% of role)

- Act as the senior finance business partner to the Senior Leadership Team and support strategic and operational decision-making, planning and development.
- Reporting to Finance subcommittee of the Board, and the full Board as required.

- Proactively contribute to the development and delivery of our Charity's strategy through developing long-term financial and commercial planning to underpin our priorities and the needs of those we exist to support.
- Work alongside our Senior Leadership Team and budget holders across our charity to set and monitor financial budgets and success measures; reviewing, supporting and driving forward agreed actions and overseeing reforecasting as appropriate.
- Review and oversee the development, maintenance and adhere of financial policies and procedures, ensuring compliance with applicable regulations.
- Identify, manage and escalate financial risks as part of the organisation's overarching risk management priority and processes as part of monitoring, reporting and mitigation.
- Support the rest of the Charity team to become financially informed and comfortable understanding financial performance, control, and accountability.
- Representative of Age UK York within the national Age UK network to support partner information returns and other responsibilities under the Brand Partnership Agreement and positively harnessing the collective strength of the network.

Finance (approximately 80% of role)

- Provide day-to-day leadership and management of the organisation's finance function and line management of our Finance team.
- Oversee the effective planning, delivery and continuous improvements and effectiveness of our finance function arrangements and working practices.

Budgets and Cashflow

- Lead on the production of Age UK York's annual budgets, working with the Chief Executive Officer, the Senior Leadership Team and the Service Managers from initial creation through to Board approval, ensuring the organisation is meeting its strategic priorities and objectives and delivering to our business plans.
- Lead quarterly reviews of the budgets and cashflow and the effects of any changes.
- Appropriately budget phasing over the financial year and converting the Annual Budget to a Cashflow Forecast and managing the Cashflow of the organisation.
- Develop and review long term organisational financial modelling and planning.

Accounting

- Prepare month end accounts including overseeing the completion of all month and year end accruals and adjustments to the accounts.
- Oversee the management of the Purchase and Sales Ledgers.
- Oversee the management of the Bank, Petty Cash and Cash Floats, reviewing the number of bank accounts required and ensuring all income is collected and banked promptly.
- Manage all procurement requirements.
- Oversee the completion of the Balance Sheet Control Accounts.
- Manage the Fixed Asset Register and ensure all assets are depreciated over suitable and consistent timescales.
- Complete the VAT returns using the Partial Exemption basis, calculating the VAT recovery rate and appropriate Irrecoverable VAT accruals.
- Complete VAT reviews from time to time to ensure the organisation is compliant, seeking expert advice as required.
- Ensure secure retention of all finance documentation, stored digitally on the Age UK York intranet and Accounts programme.
- Oversee the completion of the Gift Aid returns and reviewing procedures to enable the organisation to benefit from all possible income sources.
- Lead on the completion and presentation of the monthly management accounts, incorporating good quality Forecast Outturns and variance analysis, through to Management review and Board approval.
- Lead on the completion and presentation of the monthly Balance Sheet and variance analysis through to Board approval.
- Regularly review and manage the Reserves of the organisation.
- Regularly review and manage the debts of the organisation, seeking approval from relevant Finance Committee/Board for any to be written off.
- Lead on the continual development of all financial reporting to meet the needs of the organisation including preparation and presentation to Committee and Board meetings.
- Manage the production of statutory accounts in line with SORP recommendations and requirements and lead the annual external audit process.
- Lead on the submission of the signed Statutory Accounts with Companies House and the Charities Commission.
- Lead on the submission of the Corporation Tax return to HMRC.

Payroll

- Lead on the Payroll for all staff ensuring they are paid correctly and liaising with stakeholders involved in the process including the payroll provider, finance team, HR Manager and Operational Managers.
- Resolve all payroll queries with the support of Managers and the HR Manager as appropriate.
- Ensure the payment of all PAYE, NI and Pensions contributions to the appropriate bodies.
- Relationship manager for any outsourced arrangement with external provider(s).

Finance support for our non-Finance managers

- Ensure the delivery of effective support and training to Managers, and other colleagues, to enable their effective involvement in budget and wider financial management (setting, management, monitoring and reporting) in line with agreed policy and procedures.
- Work colleagues, including Senior Leadership Team, Service Managers and external partners, to create business modelling systems, supporting information and pricing strategies ensuring full cost recovery and appropriate charge-out rates across our grants, contracts and fees.
- Support Managers with applications and reports for external funding as required and collaborate with the charity's Communications and Marketing Manager and Fundraising and Engagement Officer in effectively harnessing data to champion our organisation profile, need and impact.
- Support Managers with cost reduction opportunities.
- Support Managers with capacity modelling and associated costings, such as in preparation for tenders, contract renewals, planning and promotion of services.
- Support, maintain and develop our systems, processes, communications and associated arrangements to deliver a successful and effective finance function.

Responsible to

You will report directly to the Chief Executive Officer of Age UK York. You will also attend both our Board of Trustees and separate Finance Committee and work alongside our charity Treasurer

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You will be a member of the senior leadership team (SLT), contributing to the strategic direction of the organisation and working closely with colleagues on joint priorities. You will also support or lead a number of our portfolios including our governance on reporting and performance.

Responsible for

Our work is made possible by our people across a number of teams. The Head of Finance will provide line management and leadership to our finance team providing direction, support, motivation and continuing development.

Line reporting roles are:

- Finance Officer
- Finance Assistant

Person Specification

Category	Essential	Desirable
1. Education, qualifications and training	• One of the following: CCAB Recognised / CIMA qualified / Diploma in Charity Accounting / CIPFA Certificate in Charity Finance & Accounting or substantial equivalent experience.	• Degree or equivalent. • Project management qualification. • Understanding of the external environment, including adult social care and older person's needs, and how we can best add value.
2. Knowledge and skills	• Ability and full working knowledge of the preparation of management accounts budget setting, monitoring, forecasting and reporting. • Excellent working knowledge of cloud-based accounting software (e.g. Xero) and excellent IT skills, including experience of using Microsoft Office Software (including Excel) and Teams. • Success in working with confidence and resilience in leading others, making sound decisions in a timely manner, and taking ownership of outcomes. • Effective organisational skills, including planning, managing and monitoring own and others workload and working to deadlines. • Proactive, action and results-oriented and comfortable managing workload and competing priorities in a dynamic environment. • Excellent communication and leadership skills, including:	• Use AI as a business tool and understands the strategic opportunities and challengers it presents. • Knowledge of charity finance regulations. • Knowledge of charity law and regulations.

	> ability to manage, give clear direction and motivate people towards achieving defined outcomes. > engaging and effective in driving progress and success. > adept at presentations, facilitation and training including communicating and interpreting financial information to non-finance colleagues. • Effective understanding of financial statistics, accounting principles and ability to learn and acti on organisation and market trends. • Able to interpret and present complex financial and operational information, apply sound judgement, and make evidence-based recommendations. • Ability to manage a finance team to deliver successful organisation financial performance and instil a continuous improvement ethos. • An understanding of, and interest in, older people, their situations and the opportunities they may want and/or need; and how we can best add value.	
3. Experiences	• Strong accounting and financial management experience at a senior level with a proven track record in a similar role. • Adept practical/applied understanding of charity finance	• Experience of Xero accounting system. • Experience of working at a Senior Leadership level, or commitment to doing so, developing strategy and

	and the management of restricted and unrestricted income. • Familiarity with funder requirements and reporting. • Experience of working closely with senior managers and dealing with sensitive and confidential areas of work. • Experience and knowledge of charity governance and best practice including: > maintaining high standards of governance, compliance and financial control, ensuring work is thorough, consistent and well documented. > compliance with HMRC, Companies House and Charity Commission. > experience of SORP compliance. • Proven ability to identify critical indicators of performance which match strategic goals and deliver results. • Experience of line management and direction, support, motivation and development to colleagues and leading a successful team. • Experience of nurturing talent and supporting the realisation of potential including identifying learning and development needs and providing solutions with team members.	reporting organisational performance to Board level. • Previous working within the Voluntary, Community and Social Enterprise Sector. • Experience of delivering financial based awareness sessions and/or training to varied audiences, including operational managers. • Experience and understanding of organisational insight and data science and having worked within an insight driven organisation. • Experience of successful project and/or programme management.

	• Experience of critical thinking and solving complex problems which could impact the medium to long-term success of an organisation.	
4. Attributes	• A positive and professional 'can do' attitude that can flex to change and challenges. • Demonstrates a highly analytical and methodical approach, with excellent attention to detail and a commitment to accuracy. • Commitment and self-awareness to undertake continuous professional development. • Passion and commitment to work within a not-for-profit organisation and support a team approach in working to help others.	
5. Additional requirements	• Demonstrate an understanding, support and commitment to Age UK York's Vision, Mission and Strategic Aims, and our efforts to realise them.	• A driving license and access to a vehicle for work purposes including travel to different locations in undertaking the role.

How to apply

Thank you for giving your time to read about our Head of Finance.

If you would like to apply, please email us at recruitment@ageukyork.org.uk and attach a copy of your **CV** and supporting **covering letter** (max 1,200 words).

Please include:

- Your motivations for applying.
- How you meet the person specification for the role. Including your experience to date.
- Your vision for how Age UK York can further our role in supporting older people, and those around them, and realise our Strategic Priorities.
- Anything you would like to champion for the success you would bring to our charity.

Please note **applications must be sent by email to the address above** and not submitted directly via recruitment portals such as LinkedIn or Charity Job.

Dates and recruitment timeline

Applications need to please be with us by **Tuesday 8 September 2026** at **10am**.

Should your application be successful, you will be invited to a first stage interview on Monday 21st September with the final date planned to take place on Monday 28 September.

Further information

If you have any questions about the role or would like to know more about the recruitment process, please contact Rebeca Hall in the first instance by emailing recruitment@ageukyork.org.uk or call us on 01904 627995.

Thank you for your interest. We look forward to hearing from you.

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