



Age UK York's Head of Finance and Infrastructure Recruitment Pack

Application Deadline: 10am on Monday 23 February 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 been there helping 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 and Infrastructure role here at Age UK York. The role leads a number of our incredible support functions here at our local organisation who together are so vital in creating the foundations on which we can best support local older people and those around them. There is a wonderful legacy from our current postholder though also an exciting opportunity for you to take it forward and bring your own experiences, expertise and passion to this varied role at such an important time for our charity and most importantly to those we exist to help. **So why Age UK York?**

Whilst part of the well-known Age UK network we are our own charity. We are independent, local and here for you, and our focus is ever on York its people and communities.

We are all about people. Those we exist to help and those who make what we do possible – both within and outside of our charity. Our Head of Finance and Infrastructure will have a focus on both, helping to support and nurture our great team as together we can continue working collaboratively in tackling the challenges faced by too many people here across York.

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 effective, quality and safe infrastructure arrangements underpinning all we do with this role providing the leadership and responsibility to achieve this.

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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A word from our Patron – Dame Judi Dench

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

We are excited at the opportunity of recruiting to our Head of Finance and Infrastructure post and where our new colleague can help take the opportunity – building on the legacy of our current colleague – whilst providing organisational leadership as we implement and work to realise our strategy, *One Team, Supporting York*. It comes at a time our local York based charity is needed as much as ever in supporting Older People in tackling the daily challenges increasingly faced by us all as we age together with the financial challenges, we ever face in sustaining our charity and the difference we make.

Our Head of Finance and Infrastructure is a vital colleague leading our support function team and working alongside colleagues across Age UK York helping us to together meet our mission, vision and six strategic priorities – with a particular focus on those vital enablers of *strengthening our organisation* and realising the opportunity of *income generation and sustainability*.

The role will lead on the management of the finances for Age UK York as well as the wider organisational infrastructure. The role will have both an internal and external focus and will enable our organisation to have good quality, accurate and timely management accounts and

1. Strengthening our organisation

2. Maximum impact on greatest need

3. Access and Reach

4. Participation and Influence

5. Partnerships and Collaboration

6. Income Generation and Sustainability

Above: Our Six Strategic Priorities

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other financial, data and insight information. The role will help inform our decision making helping us to make every penny count and to develop, manage and realise our financial goals.

As a member of our Age UK York Leadership Team, our Head of Finance and Infrastructure will lead on the preparation and review of effective and quality financial reporting and their interpretation and ownership of our operations managers and Board of Trustees in fulfilling their role. Our income generation and sustainability is a core priority and the role will help develop collective strategies and actions to reduce financial risk and maximise income generation and the use of our vital funds in support of colleagues and those who rely on our services whilst advising on the financial viability of our many projects. The role will lead the financial management for both the Charity and its trading company.

The role will provide a strategic and customer focused approach to effectively manage, develop and strengthen the wider infrastructure of our organisation and form part of our collaboration as a member of the wider Age UK national network. The infrastructure responsibilities will see the postholder work both directly and in collaboration across our Age UK York teams with a focus on our Health and Safety, Information and Communication, Estates and Risk Management arrangements.

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. 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.



Above: York residents at an Age UK York social club marking the 80th anniversary of VE Day, 2025



Summary of the Head of Finance and Infrastructure role

| | | | |
|------------------------|--|--------------------------------|--|
| Location | St Edmunds Office, York. YO10 4UX, Role offers office and home hybrid working | Reports to | Chief Executive |
| Hours | 35 hours a week | Working pattern | Monday-Friday. Nb flexible hours can be considered. |
| Contract term | Permanent | Type of role | Finance / Executive |
| Responsible for | <ul style="list-style-type: none"> • Business Support • Finance • Health and Safety • ICT • Premises • Risk Management and Business Continuity | Line Management reports | <ul style="list-style-type: none"> • Finance Officer • Finance Assistant • Operations Manager • Data and Reporting Project Manager |
| Salary | £39,527 (full time equivalent) | Holidays | 5 weeks and 1 day plus bank holidays |

Responsibilities

The Head of Finance and Infrastructure will participate as a member of our organisation's Senior Leadership Team (SLT) and will work in support of the Board and wider organisation across all aspects of the role and provide leadership.

- > Line management and leadership across our support function colleagues providing direction, support, motivation and continuing development.

Finance (approximately 60% of role)

Budgets and Cashflow

- > Ensure adherence to the policies and procedures of Age UK York including for financial and wider infrastructural responsibilities and delivery.
- > Lead quarterly reviews of the budgets and cashflow and the effects of any changes.
- > 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.

- > 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.
- > Complete 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.
- > Write and present all Finance Reports for all Committee and Board meetings.
- > Lead on the completion of the annual statutory accounts through to Audit and AGM approval.
- > 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.
- > Lead on the continual development of all financial – and where applicable infrastructure based - reporting to meet the needs of the organisation.

Payroll

- > Lead on the Payroll for all Staff and Volunteers ensuring they are paid correctly and liaising with the payroll provider, HR Manager and Operations 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 with devolved budget responsibilities to enable their effective involvement in budget and wider financial management (setting, management, monitoring and reporting) in line with agreed policy and procedures.
- > Support Managers with Business Cases and Financial Modelling to assess the financial viability of a variety of projects.
- > Support Managers with cost reduction opportunities.
- > Support Managers with capacity modelling and associated costings, such as in preparation for tenders, contract renewals and promotion of services.

Income Generation and business development

- > Advise on investment opportunities and overarching sources of income and expenditure to provide decisions and strategies that the organisation should take and support their enactment.
- > With the Chief Executive and Directorate team contribute to the tendering, commissioning and the selling of services through the provision of development of financial/budgetary information, demonstrating value for money and supporting pricing setting as appropriate.
- > Support the Chief Executive, Deputy Chief Executive and Head of Care in their roles in the management of contracts for services through the proactive liaison regarding invoicing and payments, budget management and financial reporting etc., and through ensuring compliance with non-service delivery contractual obligations.
- > Support Managers with applications and reports for external funding as required and collaborate with the charity's Communications and Marketing Manager and

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Fundraising and Engagement Officer in effectively harnessing data to champion our organisation profile, need and impact.

- > Work as part of cross organisation approach in delivering our income generation plan and connections across Age UK York and with supporters and communities.

Infrastructure (approximately 30% of the role)

Premises, Health and Safety, ICT and Administration

- > Line Management of our Operations Manager in their delivery of our organisation's business support function and associated responsibilities.
- > Oversee and co-ordinate the management for Age UK York's estates including our both physical (office and shop properties) and digital footprint. Ensuring all premises used by the organisation meet the needs of the organisation, are safe and secure and that all health and safety procedures and legal obligations are fulfilled.
- > Delivery of our information and communication technology (ICT) function alongside our third-party providers and suppliers, to include overseeing:
 - ICT function, resilience and digital innovation at Age UK York
 - Information Governance and compliance under the General Data Protection Regulation (GDPR)
 - Data analytics, reporting and communication across our teams including administrative management and support to organisational CRM(s).
 - Development of organisation insight and data science within Age UK York in support of our vision, mission and strategic aims.
- > Health and Safety leadership working with the Chief Executive and colleagues in its coordination and promotion of awareness and messaging across the organisation.
 - Ensure effective policy(ies) and procedures are in place and in line with current legislation and good practice. Support organisation's compliance with Charity Quality Standard and in line with ISO 45001.
 - Oversee the delivery of Age UK York's commitments to people's health and safety and ensuring a safe environment for all.
- > Risk management leadership working with colleagues including Senior Leadership Team and Board of Trustees in the delivery of organisational risk management.
 - Leadership and management coordination of the organisational incident management and reporting arrangements ensuring effective culture and action as part of Age UK York's continuous learning and improvement.
 - Support the organisation's ongoing identification, mitigation and management of health & safety risks associated with people, premises, tasks, activities and workplace stress.
 - Oversee development and maintenance of organisation's risk register and its enactment across Age UK York.
- > Lead in promoting environmental and sustainability issues across the organisation.

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- > To oversee and support the organisation's Business Continuity Management alongside colleagues including planning, training and exercising in line with ISO22301.

Other Duties (approximately 10% of the role)

- > Member of our organisation's Senior Leadership Team (SLT), contributing collective to organisation's strategic priorities and holding respective organisational portfolios.
- > Support the creation, review and validity of effective and current policies and procedures owned by the role and Finance and Infrastructure team.
- > Identify and support Managers with continual business process improvements.
- > Support, maintain and develop our systems, processes, communications and associated arrangements to deliver a successful and effective finance function.
- > Work with colleagues to ensure adherence to all regulations.
- > Act as a point of contact between Age UK York and the national Age UK network to support partner information returns and other responsibilities under the Brand Partnership Agreement.
- > To be an ambassador for the Charity, positively promoting the organisation.

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

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 and Infrastructure will provide line management collectively for our range of colleagues:

- Finance Officer
- Finance Assistant
- Operations Manager
- Data and Reporting Project Manager



Driving our future | Our Vision, Mission and Values

At the heart of our charity in all we do together are 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



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Personal Specification

| Category | Essential | Desirable |
|---|---|--|
| <p>1. Education, qualifications and training</p> | <ul style="list-style-type: none"> • Educated to A-Level (or equivalent by experience) • Previous relevant experience working on finance processes and management. | <ul style="list-style-type: none"> • Professional qualification such as CCAB or AAT Accounting Technician, part or fully qualified, or equivalent. • Relevant management qualification |
| <p>2. Knowledge and skills</p> | <ul style="list-style-type: none"> • Ability to prepare, manage, monitor and report on budgets. • Extensive understanding of financial trends both within the organisation and general market. • Intermediate to Advanced level in the use of Microsoft Excel Word, and accounting systems. • Able to manage, guide and lead colleagues to ensure appropriate financial processes are being used. • Organisational skills, including planning, managing and monitoring own and others workload. • Time management skills, responding to, prioritising and delivering a range of competing demands. • Strong interpersonal, communication and presentation skills. Including interpreting and communicating financial information to non-finance function colleagues; a facilitative and accessible approach; ability to manage remote communications | <ul style="list-style-type: none"> • Knowledge of charity finance and the Charity SORP • Knowledge of charity finance regulations • Knowledge of charity law and regulations |



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| | <p>and diplomacy and conflict resolution skills.</p> <ul style="list-style-type: none"> • Effective understanding of financial statistics and accounting principles. • Working knowledge of relevant statutory legislation and regulations. • Ability to deliver against targets and support a performance and continuous improvement organisational approach. | |
| <p>3. Experiences</p> | <ul style="list-style-type: none"> • Previous experience in one or more, management or financial accounting roles delivering day to day finance functions. • Proven experience as a Finance Manager and a commitment to develop further. • Experience of line management and support, motivation and development to colleagues and collective team. • Experience of supporting the development and delivery of high-quality services through financial management and support to operational colleagues. • Experience of undertaking cost recovery analysis and implementation. | <ul style="list-style-type: none"> • Experience of Xero accounting system. • Previous working within the Voluntary and Community Sector. • Experience of delivering financial based awareness sessions and/or training to varied audiences, including operational managers. • Review and reporting on financial and data functions providing evidence-based recommendations for onward improvements and development. • Experience of creating, communicating and presenting reports to range of audiences. • Experience and understanding of organisational insight and data science and having worked within an insight driven organisation. • Experience of managing premises and Information and Communications (ICT) functions |



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|--|--|--|
| <p>4. Attributes</p> | <ul style="list-style-type: none"> • 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. <p>> Effective organisation, working to deadlines and attention to detail characteristics</p> | |
| <p>5. Additional requirements</p> | <p>> Demonstrate an understanding, support and commitment to Age UK York's Vision, Mission and Strategic Aims, and our efforts to realise them.</p> | <p>> A driving license and access to a vehicle for work purposes.</p> |



How to apply

Thank you for giving your time to read about our Head of Finance and Infrastructure role

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 **Monday 23 February 2026 at 10am**.

Should your application be successful, you will be invited to a first stage interview on Thursday 5 or Friday 6 March. Final interviews are planned to take place during the week commencing 16 March 2026.



Further information

If you have any questions about the role or would like to know more about the recruitment process, please contact Rebeca Hall by emailing Rebecca.hall@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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