



Finance Manager & Company Secretary: Information pack

Thank you for your interest in this maternity cover role at the Joseph Rowntree Reform Trust.

This role works across the Joseph Rowntree Reform Trust and the JRSST Charitable Trust, which is a connected independent charity.

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About the Joseph Rowntree Reform Trust

Joseph Rowntree (1836-1925) was a Quaker, Liberal and successful businessman in York. The Rowntree business, built around the cocoa factory, flourished and in 1904, he transferred a substantial part of his wealth to a number of Trusts with which his name is still associated. These include the Joseph Rowntree Foundation (JRF) and the Joseph Rowntree Charitable Trust (JRCT), and the Joseph Rowntree Reform Trust (JRRT). The three Trusts are entirely independent of each other.

JRRT values are rooted in liberalism and Quakerism. Our strategic vision is to bring about significant changes in the political system, making it more accountable, democratic and transparent and to rebalance power for the well-being of society.

Responding to the growing crisis of democracy and erosion of trust in the political class and institutions, JRRT's new democratic resilience strategy is a positive agenda to revitalise and strengthen democracy and protect against threats from a future populist or illiberal government.

Our priorities for grant making include:

- Money in politics
- Voter participation and election system reform (complementing the UK Democracy Fund)
- Freedom of expression and protest rights
- Disinformation
- Checks and balances

About the JRSST Charitable Trust

JRSST-CT is an independent democracy-focused grant-making charity connected to the Joseph Rowntree Reform Trust. The Trust funds work that supports advancement of understanding of democracy, and campaigns to facilitate participation by the public in democratic and decision-making processes. Our grantee campaigns for inclusive participation and democratic education have a strong focus on the people who are most excluded from democratic power, such as young people, migrants, people from communities experiencing racial inequity or on low incomes.

JRSST-CT's democracy priorities are:

- Voter participation and election system reform
- Diversity of representation in politics
- Democratic education
- Participation

In 2025, JRSST Charitable Trust committed to spending down its £4.9m endowment over ten years to accelerate progress on political inclusion and voter participation. Since late 2025, JRSST-CT has hosted the UK Democracy Fund, a pooled fund that works for a democracy in which everyone can participate, and to make the UK's voting system fairer, more accessible, and fit for the 21st century.

Company structure and finance

The Joseph Rowntree Reform Trust Ltd is a Company Limited by Guarantee (Company number 00357963), which pays corporation tax, enabling it to fund or undertake political and non-charitable campaigning.

The JRSST Charitable Trust (Company number 16786561) was endowed by JRRT in 1955. JRSST-CT is independent of JRRT and funds activity that supports its charitable purposes.

Finances

From JRRT's present capital of about £43m, Directors allocate a potential grant budget of around £2m each year, excluding administrative expenses and tax.

JRSST-CT has an investment portfolio worth about £4.9m.

The investment portfolios of JRRT and JRSST-CT are each managed for us by Cazenove Capital in London.

JRRT currently generates £900k of annual income through dividends from its investment portfolio. The annual income also goes towards the running costs for the Trust which are budgeted at £665k for 2026.

Non-grant and project expenditure	£'000
Support	374
Governance	131
Income generation	160
Subtotal	665

In addition, JRRT draws on capital to part fund its total annual costs including grants of £2m.

JRSST-CT anticipates grant spend of around £750k per annum.

Our Boards and staff team

JRRT is led by a voluntary Board of ten Directors. JRSST-CT has a voluntary Board of eight Trustees, including three that are also members of the JRRT Board. Each Board has an independent Chair.

This role will join a small team, including the Chief Executive, Programme Manager (Grants) and Administrator. JRSST-CT also has two dedicated members of staff: Head of UK Democracy Fund and Grants Manager.

Finance Manager & Company Secretary: Job description

Role: One-year maternity cover (plus some handover time at each end)

Contract: Part time 0.5 -0.6 fte, based on 37.5 hours fte

Salary: £61k pro rata depending on skills and experience

Reports to: Chief Executive

Job purpose:

- Manage and deliver the financial activities of the Joseph Rowntree Reform Trust and the JRSST Charitable Trust (referred to collectively below as “The Trusts”) with oversight of the UK Democracy Fund.
- Act as Company Secretary and lead on risk management and compliance.
- Manage the IT project manager/consultant and oversee their work on compliance.

Duties and responsibilities:

1. Financial planning

- Manage and maintain an overview of the Trusts’ investments and assets from which income is generated.
- Act as Secretary to the JRRT Finance Committee.
- Develop and maintain an overview of the Trusts’ investment portfolios, managing the relationship with the Trusts’ investment managers and ensuring that key investment performance information is reported effectively.
- Ensure effective financial systems, policies and processes are maintained, mitigate the risks of error and fraud, and are supported by robust business continuity arrangements.
- Prepare annual budgets, management accounts, capital value assessments and analysis of key financial health indicators.
- Ensure monthly payroll is completed accurately and manage staff salary, pension contributions and HMRC employment tax payments.
- Ensure the financial records of the Trusts are accurate and up to date and the accounting system is maintained and secure.
- Manage the annual audit and preparation of the statutory Annual Accounts.
- Manage cross-charging arrangements between JRRT and JRSST-CT in line with regulatory guidance, maintaining the independence of the charity.
- Maintain an overview of the UK Democracy Fund income and expenditure which is managed by the Head of the UK Democracy Fund.
- Liaison with other service providers, including payroll, tax and legal advisers as needed.

2. Financial management and administration

Responsible for effective administration of the Trusts' financial activities including:

- Cashflow for each Trust and decisions on drawdown from investments.
- Cashflow between the Trusts.
- Monthly reconciliation of all fund accounts and balance sheet control.
- Banking arrangements, mandates, transactions and credit card accounts.
- Payroll and pension schemes.
- Insurance.
- Goods and services contracts.
- Posting to and control of SAGE 50 software for all Trust entities.
- Sharing arrangements, rental value and running costs of the Garden House with its joint owners, the Joseph Rowntree Charitable Trust.
- Management of the outsourced IT support company and the IT project manager/consultant's implementation of the IT review and related compliance.
- Grant management including due diligence checks, managing payment schedules and variances with the support of the Administrator.

3. Company Secretary and compliance duties

- Act as Company Secretary for the Trusts ensuring the Trusts comply with all statutory and regulatory requirements.
- Advise on how to meet legal requirements and those of the Trusts' governing documents.
- Review and manage implementation of the Trusts' approach to risk management and to key areas of compliance including data protection and Health & Safety.
- Manage the Trusts' conflict of interest registers.
- Attend and prepare relevant papers for Board meetings, committees or working groups.

4. General responsibilities

- Assist the Chief Executive and Board as required in the work, planning, projects and smooth running of the Trusts.
- Keep up to date with developments relevant to the Trusts' work and implement personal development goals.
- Undertake such other duties and tasks as may be required of the role.

Person specification

Qualifications

- Relevant accounting qualification eg ACCA, CIMA, CIPFA, ACA.

Knowledge

- A good working knowledge of accounting, company and charity law, governance and compliance.

Experience

- Managing and implementing a range of financial and reporting functions.
- Working with Boards and Committees or similar governance body.

Technical/work-based skills

- Excellent numeracy.
- Good IT skills including use of Excel and SAGE 50.

Skills and qualities

- Strong analytical skills and structured approach, with attention to detail.
- Ability to communicate clearly to different audiences, including financial information to non-finance audiences.
- Good interpersonal skills and the ability to build and maintain positive working relationships.
- Integrity and discretion when handling confidential information.
- Effective time management, ability to prioritise workload and meet deadlines.
- Ability to self-manage effectively, work well as part of a small team with a 'muck-in' and 'can-do' attitude.
- Commitment to the Trusts' vision and values.

Desirable

- Acting as a company secretary
- Managing investments/investment advisors
- Charity law and finances

A planned handover period with the current Finance Manager will enable limited training in areas where the successful applicant does not have direct experience.

Terms and conditions

- One-year maternity cover (plus some handover time at each end).
- Salary £61k pro rata depending on skills and experience.
- Part time 0.5 -0.6 fte, based on 37.5 hours fte.
- Open to discussing options for flexible working arrangements.
- Based at York office preferable, but open to hybrid/remote working.
- Leave 25 days plus bank holidays plus three days of discretionary leave at Christmas.
- Pension 10% employer contribution, 5% employee contribution, salary sacrifice option and life assurance.
- On-site parking in York.
- Professional subscription fees.
- The job may require some UK travel.

Application process

Send the following documents by email to recruitment@jrrt.org.uk with 'Finance Manager application' in the subject line of your email:

- Supporting statement drawing out how your skills and experience would contribute to this role (two sides A4 max)
- CV specifying qualifications, education and relevant experience
- [Personal details form](#)
- [Diversity monitoring form](#) (these will be anonymised and kept separately from other application documents)

The deadline for applications is **midday on Monday 11 May 2026.**

Interviews will be held on Zoom on **Tuesday 19 May 2026.**