



Finance Manager Recruitment Pack





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| Job Title | Finance Manager |
| Salary | £40,000 – £45,000 per annum FTE pro rata |
| Working Hours | 3 days per week, negotiable but preferably would include a Friday |
| Type of contract | Permanent |
| Place of Work | Krowji, Redruth |
| Benefits | <ul style="list-style-type: none">• Cornwall Heritage Trust Family Membership• 33 days annual leave per year pro rata (to include Bank Holidays)• Pension scheme• Ability to work flexibly• Health and Wellbeing Support Package |

Overview

Cornwall Heritage Trust has experienced rapid but strategic growth over the last five years and, having just celebrated our 40th anniversary, we are about to set a strategic plan which builds on this growth while ensuring that the charity is financially sustainable and resilient for a further 40 years. We are looking for an experienced Finance Manager to join the team and work with us to ensure reliable and accurate financial record-keeping as well as coming up with innovative and creative solutions to help to build income generation. That's where you come in!

We are looking for someone with a proven track record of working within financial management in the charity sector to be responsible for overseeing the financial operations of the charity and to provide a steer on the strategy moving forwards.

This will include production of regular management information and draft annual financial accounts, oversight of key operations such as payroll and VAT as well as supporting the income generation activities of the Trust and contributing to the smooth running of the fundraising function.

To be successful within this role you will need to have the skills and expertise to be able to work independently and without constant supervision. We are looking for a self-starter with excellent attention to detail and the imagination to come up with new and innovative solutions. Outstanding people and communication skills will be required for the line management of staff, but also when presenting management information to the trustees, CEO and senior leadership team.

Working closely with the CEO and Board of Trustees, this role will be key to strategic and organisational development.

Finally, a great sense of humour and a willingness to help the wider team when required is essential.

About Cornwall Heritage Trust

Formed in 1985, Cornwall Heritage Trust was created in response to fears that many of Cornwall's heritage sites were being "lost" to private ownership and the lack of an organisation with the ability to raise the necessary funds to save these important sites and promote Cornwall's unique heritage.

Between 1985 and 1989, Cornwall Heritage Trust acquired four historic sites around Cornwall, namely Sancreed Beacon, Castle an Dinas, Trevanion Culverhouse and Treffry Viaduct. In 1996, English Heritage approached the Trust with a request to manage six of their free sites in Cornwall, with a seventh being added in 1997.

Twenty years later, the Trust acquired the field in which Trethevy Quoit stands to protect the setting of the monument, this action led to the Quoit being removed from the Heritage At Risk Register. In 2022, Caer Bran, an important multi-age hillfort site near Sancreed, was purchased by the Trust to protect the nine-hectare site from possible development and intensive agricultural use. Since then, eight more historic sites have also come into the charity's care meaning that we now look after 20 in total.

Today, Cornwall Heritage Trust continues to embody the original aims set out 40 years ago – to preserve and strengthen Cornwall's heritage, with the more recent vision of "heritage for one and all".

Our work with historic sites is just a part of what we do. We also run a highly successful education programme which offers workshops and classroom sessions as well as providing school transport grants which enable children to visit ancient sites, museums and historic properties across Cornwall. Alongside wellbeing and social prescribing sessions, our popular outreach scheme comprises a variety of community events, skills sessions and activities designed to raise awareness of both Cornwall's heritage and the charity.

Heritage Promotion remains a key priority for the Trust and focuses on engagement with the Cornish communities to raise awareness of heritage in Cornwall and the challenges faced.



Key Responsibilities

Management Information

- Timely production of accurate monthly management accounts and financial reports to enable analysis and close management of cashflow and budgeting and as a tool to identify trends, risks and opportunities for improvement
- Management of cashflow forecasting and projections to ensure efficient use of resources
- Liaison with colleagues to provide information and reporting required for budgeting, fundraising and day to day operations
- Preparation, analysis and delivery of quarterly management reports and cashflow forecasts for presentation to the Finance Sub Committee and Trustee Board

Annual Financial Accounts

- Preparation of the draft annual financial accounts
- Collation of the information required by the external Accountants/ Auditors
- Liaison with the Trust's Accountants to facilitate the timely production of the financial accounts

Fundraising, Income Generation and Business Development

- Accurate allocation of income and expenditure relating to particular projects and events to enable submission of claims to funders
- Analysis of project budgets to support new funding applications and successful delivery of current projects
- Liaison with colleagues to provide accurate, timely and insightful information to assist with the preparation of funding bids and growth of income generation strategies
- Oversight of claims to funders to ensure accuracy and prompt submission
- Provision of information required to assist with the management of events, growth of the corporate sponsorship scheme and membership function
- Identification and implementation of new income streams and funding solutions to enable the organisation to grow sustainably

Regulation/ Compliance

- Compliance with Companies House and Charity Commission deadlines for annual submissions
- Compliance with accounting principles, regulations and laws
- Adherence to Charity Law e.g. accepting of gifts or donations
- Oversight of timely submissions and ensuring compliance with HMRC requirements for payroll, NI, pensions, VAT and Gift Aid
- Adherence to the Trust's financial authorities and policies
- Develop, review and introduce financial policies, procedures and controls

General

- Maintenance of the Asset Register
- Oversight of the payroll and VAT functions
- Ensure timely payment of bills and collection of receipt of monies due to the charity
- Contribution to the management of an up-to-date and meaningful Risk Register
- Liaison with insurance, banking and investment providers
- Regular review and re-negotiation of contracts and services to ensure best value and cost saving where possible
- Line management of the Finance Officer and recruitment and induction of additional team members where applicable
- Contribution to the formulation and delivery of the strategic objectives of the Trust

Key Relationships

- Reporting to the CEO
- Senior Leadership Team
- Line management of Finance Officer
- Fundraiser and Fundraising Officer

Skills and Attributes

| | Attribute Requirements | Essential | Desirable |
|-------------------|--|-----------|-----------|
| Experience | Working in the charity sector | | ✓ |
| | Working in the heritage sector | | ✓ |
| | A minimum of three years' experience in financial or accounting management | ✓ | |
| | Leading teams and line management | | ✓ |
| | Experience of preparation of year-end accounts | ✓ | |
| | Presenting to Boards of Trustees/ Directors | ✓ | |
| | Cashflow management | ✓ | |
| | Production, analysis and reporting of management accounts | ✓ | |
| | Budgeting | ✓ | |
| | Developing commercial income streams | | ✓ |
| Skills | Proficient in the use of the Xero accounting package | ✓ | |
| | Demonstrable track record of delivering KPIs and performance targets | ✓ | |
| | Project Management skills and experience | | ✓ |
| | First class communication skills – written and verbal | ✓ | |
| | Data-driven with strong analytical and presentation skills | ✓ | |





Skills and Attributes

| | Attribute Requirements | Essential | Desirable |
|---------------------------|--|-----------|-----------|
| Education | Formal accountancy qualification: ACCA/ CIMA/ ACA or equivalent | | ✓ |
| | A degree in Finance, Accounting, Management or equivalent | | ✓ |
| Knowledge | Strong working knowledge of payroll, VAT and pensions | ✓ | |
| | Gift Aid process | | ✓ |
| | Full, current knowledge of accounting principles and charitable company requirements | ✓ | |
| | Knowledge of the Cornish charitable sector | | ✓ |
| Personal Qualities | Meticulous attention to detail | ✓ | |
| | Able to manage own time and priorities | ✓ | |
| | Strong team player | ✓ | |

Recruitment Process

How to apply

An application form can be downloaded from our website and should be completed with reference to the role specifications detailed in this document.

This should be emailed to Cathy Woolcock on careers@cornwallheritagetrust.org by midday on Monday 2nd March 2026 and ensure that your email is entitled "Application for Finance Manager vacancy". You may enclose a CV and covering letter if you wish, however, applications without the application form will be disregarded.

Process

Shortlisting will take place shortly after the deadline date and selected candidates will be invited to an interview, which is expected to take place on the week commencing 9th March 2026. All applications will be acknowledged and the outcome advised in due course.

Contact

If you would like to find out more about the vacancy, please feel free to get in touch for an informal chat by emailing Cathy Woolcock in the first instance.

Email careers@cornwallheritagetrust.org

Phone 01209 707008

Website www.cornwallheritagetrust.org





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HEADQUARTERS

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Registered Charity No. 291607
Company No. 1901905

