



HISTORIC
BUILDINGS
& PLACES

VOLUNTEER TRUSTEE: FINANCE ROLE

RECRUITMENT PACK

2026

INTRODUCTION FROM CHAIR OF TRUSTEES AND THE DIRECTOR

Join Us in Strengthening the Future of Heritage

Historic Buildings & Places (HB&P) is at an exciting turning point. As a Charitable Incorporated Organisation (CIO) with over 100 years of history, we help people care for historic buildings and places across England and Wales. We are looking for a trustee with financial expertise to join our Board and the Finance Committee, providing leadership in financial governance and oversight as we grow and adapt.

Historic buildings face increasing challenges, from changing community needs to the climate emergency. HB&P is dedicated to ensuring heritage is preserved for the future while supporting local communities in making informed changes.

We are expanding our engagement programme, with more events, training, and publications, and are seeking trustees to help guide us strategically and financially. As a trustee, you will be central to **supporting our staff team, shaping our strategy, and ensuring financial health and sustainability.**

We look forward to receiving your application and to working together to secure a sustainable future for historic places.

Sara Robertson, Chair of Trustees

Liz Power, Director



ABOUT HISTORIC BUILDINGS & PLACES

Historic Buildings & Places (HB&P) is an independent charity that works to sustain, defend, and promote all aspects of the built historic environment for the benefit of all. We are one of the National Amenity Societies and are unique in our mission to defend buildings and places of all ages and types. We have a particular focus in under-regarded heritage valued by local communities.

Formerly known as the Ancient Monuments Society, our organisation was founded in 1924 in Manchester, and we have played a significant role in safeguarding the nation's architectural heritage ever since. As a well established charity, we are in a strong financial position but we are looking to do more with our funds to help achieve better impact for heritage.

As a statutory advisory body, our work involves giving advice on the potential demolition and changes to listed buildings in England and Wales. This work is funded by Historic England and the Welsh Government. We are involved in advocating for the protection and conservation of historic buildings and places through engagement with government bodies, planning authorities, and other stakeholders. Our Casework Committee supports us in this role.

We maintain an active membership base comprising individuals and organisations who share our passion for heritage conservation. Our membership programme offers a range of benefits, including publications such as a regular magazine and an annual journal; visits and talks for both members and non-members; and training for those in heritage.



OUR MISSION, VISION AND VALUES

VISION

We will work for the benefit of communities to secure a sustainable future for historic places and built environments, celebrating heritage in all its richness and diversity.



MISSION

To sustain, defend and promote historic buildings and places of every type and age for the benefit of all.

- We offer advice and expertise.
- We promote historic places and celebrate them.
- We share our knowledge to influence and enlighten.
- We work in partnership with others to deliver our aims.
- We place sustainability at the heart of all our activities.



VALUES

- We take pride in our constructive approach to advice and to problem-solving.
- We share our knowledge and principles with the public.
- We acknowledge diverse views and seek to engage with them.
- We fulfil our duties as one of the government's statutory advisers.
- We comply with Charity Commission guidance on good governance.



THE ROLE OF A TRUSTEE – FINANCE

‘Trustees have overall control of a charity and are responsible for making sure it’s doing what it was set up to do. They may be known by other titles, such as: directors; board members; governors; committee members. Whatever they are called, trustees are the people who lead the charity and decide how it is run.’

The Charity Commission for England & Wales

We are seeking a trustee with **financial expertise** to join our 12-member board and sit on the **Finance Committee**. You will support the board in ensuring **robust financial governance, sustainability, and strategic planning**.

Responsibilities

Financial Oversight and Strategy:

- Monitor and review financial reports, budgets, staff pay and forecasts.
- Advise on investment, reserves, and risk management policies.
- Support the development of long-term financial strategy to enable the charity’s mission.
- Participate in Finance Committee meetings (usually four times a year).

Governance and Strategic Direction:

- Attend board meetings and actively contribute to governance and strategy.
- Ensure compliance with statutory, regulatory, and Charity Commission obligations.

Support and Expertise:

- Provide financial insight and guidance to the board and staff team.
- Act as an ambassador for HB&P, engaging with stakeholders where appropriate.

THE ROLE OF A TRUSTEE – FINANCE

Person Specification

We are looking for someone with:

- Significant **financial expertise** (accounting, audit, treasury, or financial management experience).
- Experience in **charity finance or not-for-profit organisations** desirable.
- Strong analytical and strategic thinking skills.
- Excellent communication and collaboration skills.
- Commitment to HB&P's mission, values, and long-term sustainability.
- Willingness to dedicate time to board and committee meetings.

Previous trustee experience is helpful but not essential.



THE COMMITMENT REQUIRED

- Board meetings: four times a year (2–3 hours), in person (London) or online.
- Finance Committee: typically four meetings a year, plus occasional ad hoc consultation (1 hour online).
- Preparation for each meeting, including reading papers.
- Optional involvement in other committees, events, or advisory activities.
- Trustees receive travel support for in-person meetings.

TRAINING AND SUPPORT

New trustees receive a comprehensive induction, including:

- Meeting staff and trustees.
- Guidance on trustee responsibilities.
- Mentoring via a 'buddy' system including from members of the Finance Committee.
- Access to ongoing training and support.



RECRUITMENT PROCESS

To Apply: Send a CV and covering letter to office@hbap.org.uk by **Monday 15th June 2026**.

Pre-Application Enquiries: Contact Director Liz Power at director@hbap.org.uk.

Interviews: Online, with the recruitment panel, on **Tuesday 30th June 2026** and **Wednesday 1st July 2026**.

We look for candidates who demonstrate:

- Commitment to HB&P's mission and values.
- Strong judgment and strategic vision.
- Collaborative and proactive approach.
- Acceptance of the legal responsibilities of a trustee.



TRUSTEE RECRUITMENT FAQ

1. Do I have to be an expert in historic buildings?

No. Your financial expertise is the focus. A passion for heritage is welcome but not essential.

2. Do I need to have been a trustee before?

No. We welcome first-time trustees, especially those who bring financial knowledge.

3. How much time is involved?

Minimum four board meetings a year (2–3 hours) and Finance Committee meetings (approx. four per year). Additional involvement is optional.

4. What do I gain from becoming a trustee?

The organisation Reach Volunteering has highlighted 5 benefits people get for their career from becoming a trustee

1. Contributing to a great cause
2. Strategic experience
3. Professional networks
4. Developing skills and experience
5. Team working

5. What skills are you looking for?

Primarily: financial management, accounting, auditing, treasury, or investment experience. Other skills that benefit HB&P are also welcome.





HISTORIC BUILDINGS & PLACES

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Historic Buildings & Places is the working name of the Ancient Monuments Society, a CIO registered in England and Wales (no. 1210157).