



# CANDIDATE PACK

## CHIEF EXECUTIVE



# WELCOME

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Thank you for your interest in becoming the new Chief Executive of York Conservation Trust.

Shortly before my grandfather William Bowes Morrell's death in December 1981, he wrote; "in the days before conservation had become as popular as it is today, my father, Doctor John Bowes Morrell, and my uncle, Mr. Cuthbert Morrell, had each been buying medieval properties in York, which they restored and rehabilitated. They believed that such properties were an essential part of the heritage of York which would disappear if past neglect was not arrested and reversed". It is essentially this vision for which the Trust's strategy is based on today. We now have 76 properties in the Trust's portfolio, ranging from large, prominent and architecturally complex buildings such as the De Grey Rooms and the York Theatre Royal to smaller buildings, an example being the medieval tenement at 12 Newgate, which currently operates as a cafe. We are also operating some property as furnished holiday lets.

We are seeking a new Chief Executive who will lead the Trust into our next phase of growth and development. Following a strategic review we have identified some key priorities for the Trust and this provides clear direction for our new Chief Executive as well as scope to develop our future strategic direction. Principally, as a result of our review, the Trust is undertaking a continued programme of building condition surveys across the portfolio, which enables us to better understand and budget for the conservation work involved to bring the properties to the our required standard. In order to achieve this we will be undertaking the sale of some targeted property and launching a programme of new revenue generation, including fundraising, to supplement the income from our rentals. Despite our heritage as a charity this will be the first time that the Trust will have directly fundraised and we are keen to find a new Chief Executive who is motivated by the delivery of our strategy and the opportunity to diversify our income and to work with a committed, experienced and dedicated small staff team and Board to build our charitable impact in the City.

You will be an established leader of people who enjoys being both strategic and hands on. We are a small close knit team at the Trust and you will bring exceptional interpersonal skills – able to work closely with the staff team, our Board and our myriad external stakeholders. Strong project management skills are essential for this role – we have a demanding and extensive schedule of work ahead and you will bring a keen eye for detail and the ability to remain abreast of our portfolio. With the ongoing rising costs in our sector, it is also imperative to have highly tuned commercial acumen and you will bring a strong track record of income generation. This need not be in the charitable sector, although fundraising experience would be valuable. A background in conservation is also not essential. However, it goes without saying that you will bring an appreciation of the built environment and be committed to ensuring the preservation and conservation of historic properties alongside the ability to think creatively about their future use.

If this sounds like a role which excites and inspires you to join us and continue the conservation of this wonderful, historic City of York, we'd love to hear from you.

Best wishes,

**James Morrell**  
Chairman



# OUR STORY

Our work began in 1945 when Dr John Bowes Morrell and his elder brother Cuthbert established Ings Property Co for the purpose of 'rehabilitating' neglected buildings of historic interest and merit in the City of York.

The brothers had each undertaken a number of building conservation projects before and during the second world war, including Herbert House and Lady Peckett's Yard; they transferred those, and eleven other freeholds, to the company as soon as it was established. John Bowes Morrell was an exceptional man. At the age of 24 he was appointed the first non family director of Joseph Rowntree & Sons; his liberal persuasion took him into publishing and he built up an extensive portfolio of regional newspapers that became Westminster Press, with him as chair. Bowes' civic mindedness, drew him to local politics. He chaired many of York's influential committees and was twice elected Lord Mayor of the City. In 1940 he published *City of Our Dreams* setting out his vision of York's heritage assets both informing, and integral to the post war modernisation plan.

The early business model depended on careful purchases at low prices, loan finance from the Morrell family, rents and occasional sale of some buildings. We have one building on our balance sheet at its 1966 purchase price of £1,029; we secured that three months before England's only World Cup victory at Wembley Stadium. Over the years the number of buildings in our custodianship increased to eighty two, though that number is now seventy-six following some recent disposals.

Since 2000, the Trust has acquired the freeholds of larger and more communally important buildings such as St Anthony's Hall, The Assembly Rooms of 1732, De Grey Rooms & House, Fairfax House and in 2015 York Theatre Royal where we took over City of York Council's responsibility for these important listed structures. In 1976, after some years of careful consideration, and under the chairmanship of William Bowes Morrell, Ings Property Co changed its articles of association to become a charitable company. Its chair today is James Robert Morrell, the great grandson of our founder.

From its beginnings with seven properties, the Trust now owns and runs seventy-six buildings. Of these, 54% are for commercial use, 21% are residential, 22% are mixed use and 2% we classify as other including a mausoleum and gardens. Within these there are 160 units, 47.5% are commercial and 52.5% residential. There are four properties that we class as investment properties, which are more modern buildings than many of the others. These are Trinity Cottage, Morrell Cottages, Morrell Yard and Malt Shovel Court.

Many of the buildings will be well known to residents of and visitors to York, including York Theatre Royal, Fairfax House, The Red House, Sir Thomas Herbert's House, Gert and Henry's at 4 Jubbergate, Wealden Hall at 49 Goodramgate, the Almshouses at Ingram House, the Assembly Rooms, the De Grey Rooms and De Grey House and St. Anthony's Hall and Garden. These properties generate approximately £2m per annum.



# OUR FUTURE STRATEGY

The Trust has continued to play a significant role in the conservation of the historically important City of York and has strong partnerships and relationships across the City. In order to continue our ongoing commitment to the conservation of historic buildings across York, the Trustees approved a new strategy at the end of November 2021. Our new Chief Executive will be integral to the delivery of this strategy and the ongoing development of our future plans.

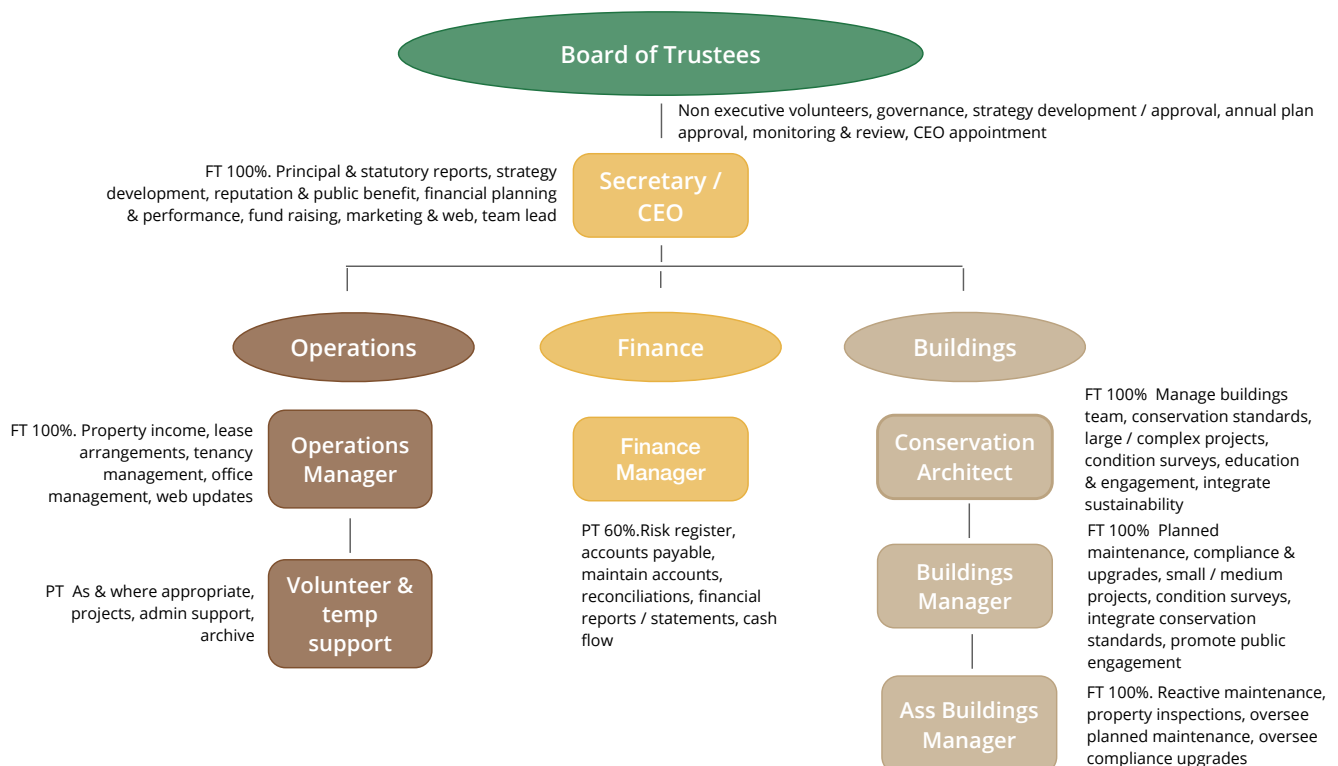
Key elements of our current strategic plan include:

- Developing a more proactive public profile, ensuring our public benefit is more widely understood;
- Significantly increasing our spend on buildings repair, maintenance, compliance and periodic conservation project overhauls;
- Strategically disposing of buildings of lower significance, to fund increased expenditure on more important buildings over the next five years;
- Pursuing opportunities for partnership arrangements that support the conservation overhaul of larger buildings such as Thomas Herbert House to ensure increased use; and,
- Secure grants and donations towards the costs of conservation projects from public bodies, charities and where appropriate individual private donors.

We are proud to be part of an active conservation community and the team in York continues to expand its knowledge of and approach to both conservation and the evolving business of conservation across its many dimensions. We learn from other projects, specialist trades, professional contacts and experienced contractors and are considering ways in which additional skills and experience can be introduced to the charity in a non executive capacity.

# ORGANISATION

The Trust's staff team is purposefully small. We contract with local firms and specialist trades people for maintenance and conservation projects; we use York based property agents for commercial and residential property lettings



# JOB DESCRIPTION

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## JOB TITLE

Chief Executive

## REPORTS TO

Board of Trustees

## DIRECT REPORTS

At five full time and one part time member of staff our executive team remains compact.

## MAIN RESPONSIBILITIES:

- Work closely with the Board and advisors in delivering on the five year strategy and development of a longer-term plan, including delivering financial health so as to enable surpluses to be generated for the Trust to meet its obligations
- Lead, inspire and motivate the Trust's talented staff team to achieve the organisation's goals, working as a cohesive group, with a positive work ethic and inclusive culture
- Be accountable for the Trust's leadership, management, resources, risk management and administration within the governance and accountability frameworks established by the Board of Trustees
- Support strong governance of the charity through high quality, transparent work with the Board. Work with the Chair to enable the Trustees to fulfil their duties and legal and other responsibilities. Ensure that the Board is made aware in a timely fashion of any matters requiring its attention
- Take responsibility for all compliance and the proactive management of risks as well as management of financial resources, premises and other assets
- Ensure that the charitable purposes of the Trust are followed and that it delivers the appropriate charitable public benefit
- Work with the small executive team to plan achievable budgets for approval by the Trustees. Explore ways of diversifying income and maximising revenue from a variety of sources and ensure rigorous management of income and expenditure within the agreed budgets
- Represent the Trust and act as an advocate and ambassador with a wide range of stakeholders and partners within York
- Together with the Chair of the Trustees, maintain a balance between Trustees' policy-making and the executive's responsibilities while ensuring the Trust complies with its regulatory obligations, including the requirements of the Charity Commission
- Ensure that the Company complies with all the legislation in respect of the latest Charities SORP and the Companies Act and submits all its statutory returns by the due dates
- Keep fully informed as to the latest legislation affecting the Trust's Properties including the relevant Landlord and Tenant Act, Housing Acts, and similar legislation. If necessary, the Trust's solicitors and the Chairman should be consulted



# PERSON SPECIFICATION

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## KNOWLEDGE AND EXPERIENCE

- Leadership experience at a senior level in an organisation of at least a similar size
- Experience of leading a team alongside up to date knowledge of employment best practice
- Significant experience of successful project planning and management including monitoring, evaluation and project reporting
- A track record of diversifying and generating income
- Strong budget management and financial reporting skills (able to read and interpret charity accounts but does not need to be a qualified accountant)
- Experience of working with or as part of a Board to shape and set organisational strategy

## SKILLS AND ABILITIES

- Excellent team builder with the ability to motivate others to achieve results
- Sharp commercial acumen combined with high analytical capacity
- Excellent communication skills; able to articulate and present ideas in a clear and coherent way both verbal and written
- Excellent people and interpersonal skills, especially the ability to establish effective and positive relationships with a wide variety of people, stakeholders and diverse organisations
- Demonstrable ability to translate strategic objectives and ideas into effective delivery and operational management
- Effective and decisive management and business planning skills, with the ability to manage and prioritise work to deadlines and achieve results with and through others

## STYLE AND BEHAVIOURS

- Strong sense of charitable purpose and the ability to grow a personal commitment to the Trust and its mission and values
- Ability to maintain high levels of enthusiasm and self-motivation and inspire others
- Confident and able to act as an advocate and ambassador for York Conservation Trust
- Extremely well organised and able to determine and manage multiple priorities
- A positive approach demonstrating tact and diplomacy
- An interest and enthusiasm for conservation



# TERMS OF APPOINTMENT

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## SALARY

This role attracts a salary of £70,000 - £80,000.

## CONTRACT

This is a permanent, full-time executive appointment.

## LOCATION

Based at the head office in De Grey House, St Leonard's Place, York, YO1 7HE. Although there is openness to some hybrid working. Full time home working will not be considered.

## HOURS

Full Time (37.5 hours per week). You may be required to work longer hours which may, on occasion, require evening and weekend attendance should urgent Trust matters arise.

## ANNUAL LEAVE

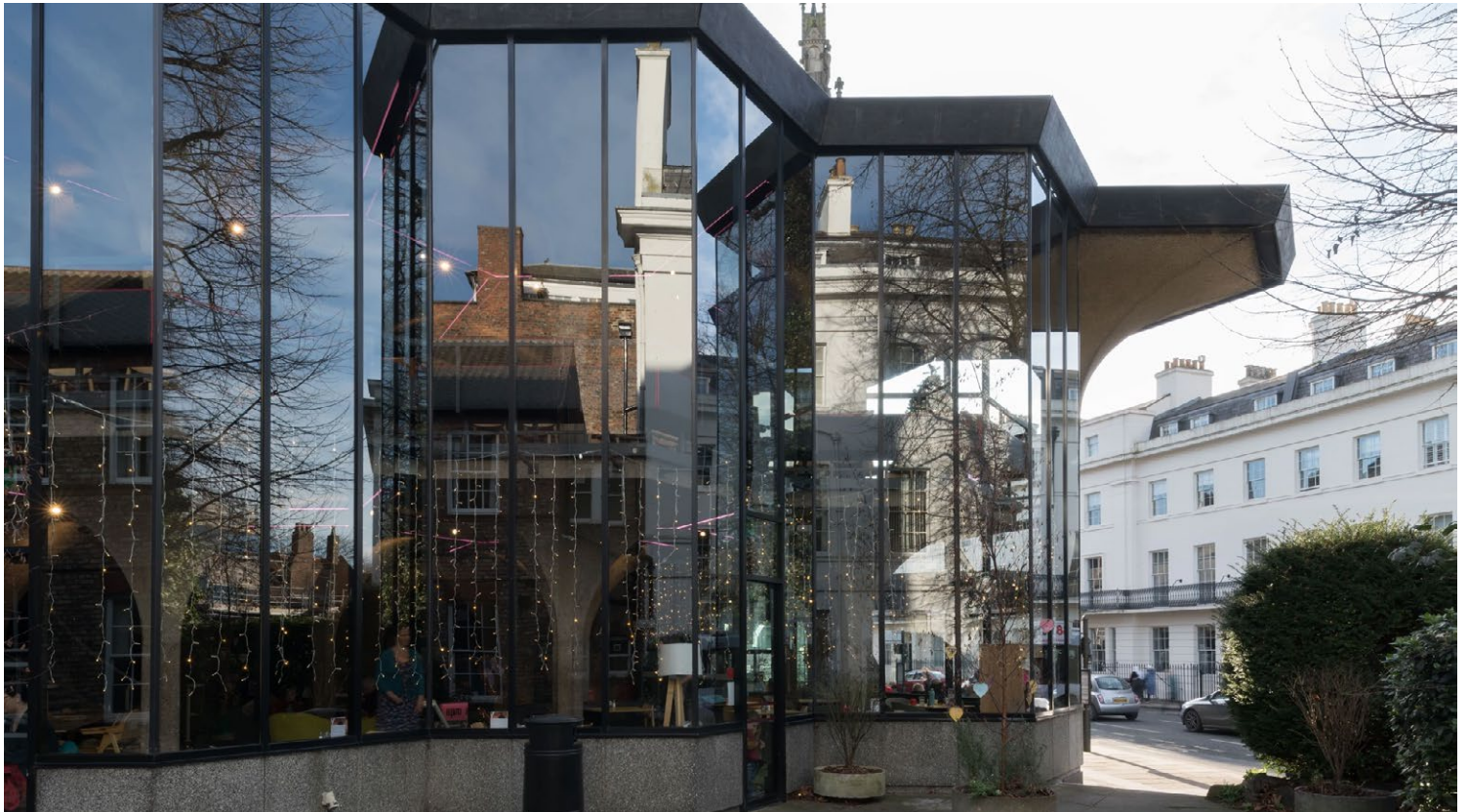
25 days annual leave plus bank holidays.

## PENSION

Contributory Pension Scheme.

## OTHER

You will not, during your employment with the Company, engage in any private business of property development, property dealing or the letting of property, or in any other business which may in any way conflict with the interest of the Company without the prior authority of the Chairman of the Trustees.





# HOW TO APPLY

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We hope you will consider making an application. If you have questions about the appointment please contact Hannah Chapman on [Hannah.chapman@starfishsearch.com](mailto:Hannah.chapman@starfishsearch.com) or Juliet Brown on [juliet.brown@starfishsearch.com](mailto:juliet.brown@starfishsearch.com) To make an application, please go to <https://starfishsearch.com/jobs/yct-ce/> and click on the apply now button, with the following prepared:

- Your CV (no more than three sides).
- A supporting statement (no more than two sides) that sets out why you think this role is the right move for you and how you meet the knowledge and experience criteria.

We would also be grateful if you would also complete the Equality and Diversity monitoring form on the online application process. This form is for monitoring purposes only and is not treated as part of your application.

<b>Closing date:</b>	17th July 2023
<b>Preliminary interviews:</b>	Mid August
<b>Final interviews:</b>	Beginning to mid September

