

Candidate Pack

Lead Trustee for finance

February 2026



Welcome

Could you use your strategic financial skills to help us advance the wellbeing of everyone in the UK? If so, please consider joining our Board of Trustees in this critically important role for the governance of the organisation.

Carnegie UK is a charity which has been working to improve wellbeing in the UK and Ireland for over 100 years. Previously a grant-making foundation, we now seek to influence policy and practice at a systemic level, building on evidence and research to argue for change. In 2021 we published our strategy, "[Learning how to live well together](#)," which sets out how we work to improve wellbeing for the people of the UK and Ireland.

We are proud of our respected track record of putting wellbeing at the heart of decision-making and growing support for a wellbeing approach to public policy. We believe that this mission is more important than ever given the challenges of the current times, and we are building on strong foundations.

We are fortunate to have a secure income, but strong financial planning and effective management of our endowment remain critical to the achievement of Carnegie UK's mission now and into the future. As lead trustee for finance, and Chair of the Finance Committee you would lead the Board's consideration and implementation of our financial strategy, working closely with the staff team and our investment manager.

We are building a diverse Board, believing that greater diversity of experience, skills and ways of thinking will challenge our approaches and broaden our collective knowledge and networks. [Our trustees](#) are drawn from locations across the UK and Ireland and we will welcome applications from any suitably-qualified candidates. If you are an accountancy or finance professional; motivated by our mission for collective wellbeing; curious about the levers of social change; open to learning, and attracted by a values-based organisation, then we'd love to hear from you.



A handwritten signature in black ink, appearing to read "D Emerson".

David Emerson
Chair



A handwritten signature in black ink, appearing to read "S Davidson".

Sarah Davidson
Chief Executive

About us

Carnegie UK has been working to improve wellbeing in the UK and Ireland for over 100 years. Established and endowed in 1913 by the Scottish-American philanthropist Andrew Carnegie, that mission has evolved over time to reflect changes in society and governance. We are part of a “family” of foundations and institutions across several countries, all established by Andrew Carnegie, but operating independently.

Historically a grant-making foundation, we gradually moved to our current approach of seeking to influence policy and practice at a systemic level, building on evidence and research to argue for change.

As an operating foundation today, we primarily fulfil our mission through funding the policy and advocacy work of our core staff team of fifteen. Our experience tells us that we can have the biggest impact on people's lives when we influence decision-makers, whether these are businesses, politicians, civil or public services, or non-governmental organisations. We work with partners to contribute to what is known about wellbeing, testing and studying what works in practice. We then use evidence to make the case for approaches, policies and systems that need to change, and recommend how to make that happen.

Our operating income is derived entirely from our endowment, currently valued in the region of £47m. We are committed to investing our assets in ways that align with our mission and are members of the Charities Responsible Investment Network.

For more information about the work of Carnegie UK, please see our [website](#).

We work in ways that reflect our organisational values:



Role profile

Working closely with the CEO and the Head of Finance, the lead trustee for finance will take a lead role for the Board in financial strategy, bringing an external perspective and supportive challenge to our financial planning and management.

Candidates for this role should have a strong interest in the Carnegie UK's work to promote wellbeing, as well as a strong background in finance and/or accounting, preferably with an understanding of charity finance. You will operate at a strategic level, as interested in the influence and impact of our investments as you are in our annual accounts. You will be willing to represent the organisation and able to commit the necessary time to governance, enjoying the variety of perspectives that comes from engaging with [your Board colleagues](#).

The anticipated time commitment includes preparation for and chairing of quarterly Finance Committee meetings held online, as well as preparation for and attendance at quarterly Board meetings (two a year in Scotland, one in London and one elsewhere in the UK or Ireland). The Chair of the Finance Committee is also a member of the Audit and Risk Committee, which meets online twice a year.

The lead finance trustee is also asked to make themselves available for an annual in-person meeting with our Investment Manager, and for ad hoc consultation by the CEO and Head of Finance.

Trustees are collectively responsible for:

- Undertaking the general and specific duties of charity trustees to meet legal requirements and ensure that the organisation is well run.
- Providing leadership, contributing to the setting and shaping of Carnegie UK's strategic direction and learning from the work as it develops and progresses.
- Championing our work by supporting Carnegie UK's activities, fostering networks within wider communities, and promoting what we do to their peers and contacts.
- Offering valuable resource in terms of supporting, questioning and holding the Executive to account.
- Working as part of the Board to ensure Carnegie UK functions within the legal and financial requirements of a UK registered charity and company and our constitution, and that we always strive for best practice.

The lead trustee for finance has additional specific responsibilities for:

- On behalf of the Board of Trustees, working with the Chief Executive and Head of Finance to ensure that the organisation's financial obligations are met.
- Acting as a 'critical friend' to the Board on financial matters, providing strategic financial insight and support as required.



Skills, abilities, values and behaviours - you will be:

- From a strong background in finance and/or accounting.
- Familiar with operating in a Board structure in the charitable or public sector, or in a commercial organisation.
- Intrinsically curious with a readiness to probe, challenge and enquire, alongside the judgement to do so constructively.
- Comfortable with contributing to effective decision making.
- Strategic in outlook.
- Collaborative in your approach to leadership, with strong interpersonal and relationship-building skills.
- Demonstrably committed to the principles of diversity, equity and inclusion.
- Wholly committed to the mission and values of Carnegie UK, able to exemplify our concept of living well together and bring to life what it means to be motivated by change; challenging; kind and collaborative.

How to apply

This recruitment is being led on Carnegie UK's behalf by David Bond. For a confidential informal discussion or to learn more about the role, please contact David at david@mcgregorbond.com or 07801 490678.

To apply, please submit your CV and a supporting letter of no more than two pages to david@mcgregorbond.com

Applicants will be shortlisted for interview by matching the details given in their application against the role description and person specification. We would therefore ask you to provide clear evidence to show how your experience, skills and knowledge match those requirements, as well as telling us why you are interested in and motivated by the role.

Please also complete the [Diversity Monitoring Form](#) which can also be found on the recruitment page of our website.

Timetable

Closing date: 16 March 2026 at 5pm

Shortlisting: Complete by 23 March 2026

Interviews: 30 March 2026

Interviews are likely to take place in either Dunfermline or Edinburgh. An online interview can be arranged for any candidate unable to attend in person. Please indicate in your application if you would be unavailable on any of the dates set out above, we will do our best to accommodate you.



Economic wellbeing



Democratic wellbeing



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Carnegie United Kingdom Trust
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