



advice UK



Treasurer Recruitment Candidate Information Pack October 2025

Welcome from our Chair

Thank you for taking the time to find out more about the Treasurer/Finance Trustee role we are recruiting for AdviceUK's Board.

With almost 700 members, [AdviceUK](#) is the biggest network of advice services in the UK. As a membership organisation, our priority is to make our members' work easier so they can focus on supporting their clients. We do so through direct support, advice and guidance and by advocating on members' behalf with funders, policymakers, regulators and others who influence the environment in which independent advice services work.

We are rightly proud of our diverse community of members. In 2024, they provided free, independent advice to over 2.8 million people. They did so whilst supporting more people with ever more complex advice problems and whilst struggling themselves to remain sustainable as funding levels further decreased.

We have embarked on a new strategy, and it is an exciting time to join our Board. We are investing some of our substantial reserves in new and improved benefits for our members; better engagement with and involvement of members in our work, as well as increased capacity so we can amplify our members' views and concerns with decision-makers in England, Scotland and Wales.

Our vision is that every individual, regardless of means, should be able to access the advice they need in order to exercise their rights and deal with any legal and social welfare problems they may face. If you would like to be part of helping us achieve this, please do apply.

Best wishes

Baljit Badesha

Chair

Our purpose is to improve the lives of people in need of advice. We do this by supporting our members, so it is easier for them to help their clients.



About us

Who we are

With approximately 700 member organisations, AdviceUK is the national charity supporting the UK's largest network of independent advice centres. In 2024, our members helped 2.8 million people with problems relating to debt, housing, employment, immigration & asylum, welfare benefits and consumer rights. As their association body since 1979, we support them with a range of services to help them be effective in helping others.

What we do

Since our founding in 1979, we've supported advice providers with training, information, and advocacy to help them make a bigger social impact. From our beginnings as the Federation of Independent Advice Centres (FIAC), formed by community activists in London, we've grown into a thriving national network representing a diverse range of advice services.

In recent years, new types of advice providers have emerged, and we have broadened our eligibility criteria accordingly. The pandemic saw us (like many organisations) move much of our support online, which our members have embraced.

We have developed commercial products like Advice Pro, generating income which gives us the financial sustainability to support our mission. Our strengthened financial position is enabling us to invest in new initiatives and drive further development. We've embarked on a digital transformation, reinforcing our position as the home of innovative advice. New online systems and service channels now complement traditional face-to-face and telephone support. We're investing significantly in our digital capabilities to enhance communication, collaboration, and connection across and between members.

Our impact

Every year, we help our members make a difference for millions of people across the UK, from those facing debt or housing problems to students, disabled people, and survivors of domestic violence.

We are relatively small, but nimble, and innovative, often competing with larger organisations. We value entrepreneurial spirit, react quickly to opportunities and avoid heavy bureaucracy to support member services.

We measure what matters, using data, member feedback, and research to understand our impact and continually strengthen the sector we serve.

In 2024, we have, among many things:

- Welcomed **41 new members**, expanding our network and reach.
- Retained **93.5%** of our members, with those who left doing so because of closure or funding constraints.
- **Delivered over £2.29 million** in funding directly to advice services.



Our vision, mission & values

Strategy Statement 2025

We are a small charity that has a big impact. Our purpose is to improve the lives of people in need of advice. We do this by supporting our members, so it is easier for them to help their clients, and by directly influencing policy-makers, decision-makers and funders.

Vision

Our vision is a society wherein every individual, regardless of means, is able to access the advice they need in order to exercise their rights and deal with any legal and social welfare problems they may face.

Mission

Our mission is to support advice organisations by helping them to be efficient, competent and effective, and to campaign for a policy environment that supports advice agencies and people needing advice.

Values	
WE ARE FAIR	WE ARE INDEPENDENT
We support people and show empathy We are open, transparent and responsible We promote diversity and inclusion	We challenge where change is needed We stand up for what we believe in We celebrate the uniqueness of AdviceUK & our members.
WE ARE COLLABRATIVE	WE ARE CREATIVE
We work together to achieve shared goals We build trusted relationships We listen with an open mind, adopt a flexible and pragmatic approach	We are bold and dynamic in our approach We reflect and learn from experience We develop solutions and support based on evidence

Our strategic objectives

Support our members and, through them, the communities they serve

We do this by:

- Listening to and involving members in how we shape the support we provide for their advice-giving needs
- Providing benefits and services that strengthen and sustain community-based advice giving

Advocate for our members and, through them, the communities they serve.

We do this by:

- Working with members and stakeholders; understanding what's important to them and, where needed, championing change
- Representing and raising awareness of our members collectively: in ways that value their diversity and independence.

Connect our members with each other and key stakeholders.

We do this by:

- Nurturing collaboration, peer support and shared learning, building long-term partnerships.
- Developing and sustaining diverse networks that benefit members and stakeholders.

Innovate: lead change that improves people's lives and strengthens community advice

We do this by:

- Developing and facilitating better ways of giving and resourcing advice that improve the lives of people with legal and social welfare problems.
- Providing members with advice and insight into new ideas and emerging trends

Our commitment to diversity

We are deeply proud of the diverse, independent and innovative nature of our network of members. Each organisation is uniquely connected to local people, going the extra mile daily, to make a significant difference to quality of life.

We continue to promote diversity and inclusion and show our commitment to challenge wherever change is needed, through our values, community focus and advocacy for inclusive policies.

Through our work, we lead by supporting our members to deliver meaningful support to the diverse communities they serve, helping them make the greatest possible impact on people's lives. By ensuring that our member network reflects the diversity of these communities, we can create a space where vulnerable, disadvantaged, ethnic minority, and neurodivergent individuals feel represented and heard.

We collaborate with others across the advice sector and use evidence to challenge injustice and shape better outcomes.

An exciting time to join us

Our current strategy (2024-2027) is based on significant investment in our capacity, new support services, as well as innovation. We are excited about the next stage of AdviceUK's journey and determined to deliver the support and advice our members, the wider advice sector and their communities need.

Recruiting for a Treasurer

The [Board of Trustees](#) is ultimately responsible for the conduct and activities of AdviceUK. It makes sure our income is only used for the purposes agreed in the governing documents and that we remain true to our mission. The Trustees must act in the best interests of the organisation at all times and ensure that we comply with company and charity law. Day to day management of the organisation is delegated to the Chief Executive and staff, while the Board focuses on general direction and oversight.

We are currently looking for an experienced finance professional to join our Board in a new role as Treasurer. The Treasurer/Finance Trustee plays a key role in overseeing the charity's financial health and ensuring the Board can make informed, responsible decisions.

The role can fit around existing commitments, both professional and personal, and our trustees are a mix of AdviceUK members and professionals from a range of sectors. Previous trustee experience isn't required, and you will be supported into the role through an onboarding and induction process.

Applications are invited from individuals with integrity, a passion for our work and a drive for excellence, who can think strategically, challenge and scrutinise, read, understand and interpret complex information, and work collaboratively and inclusively. We are proud of our entrepreneurial ethos and are looking for a Treasurer who would enjoy mixing social values with an enterprising spirit.

Being a trustee

A helpful summary of trustee roles and responsibilities can be found in the Charity Commission guidance for new Trustees: [The Essential Trustee: what you need to know, what you need to do \(CC3\)](#).

What you'll gain from this role

Becoming a trustee is an interesting and compelling way to engage with the charity sector. It is a role that will give back as much as you put in, and often more. One of the primary takeaways from the [Charity Commission's 2025 research into trusteeship](#) is the extent to which trustees benefit from their experience. Although trusteeship is a significant voluntary undertaking, the majority would recommend it to others. Many trustees reported experiencing multiple and profound benefits, from feeling they are positively impacting the world to feeling more connected to a community or movement, highlighting the rewards of responsibility. Overall, just 1% of the trustee population surveyed would not recommend the role to others.

Strategic experience

Strategic experience can be hard to come by. It can often take decades to find yourself in a role which requires strategic oversight. A charity Board role is a fantastic way of getting a head start on this, allowing you to develop and hone your critical thinking, problem-solving and analytical skills. The strategic experience which can be gained through a trustee role can have an immediate and powerful impact on your career, opening doors to new responsibilities and more senior job prospects.

Equally, for those who have already had some strategic responsibilities, a Board role provides an opportunity to use those skills in a significantly different context.

Continued personal development

Through a trustee role, you can gain a clearer idea of your professional strengths and weaknesses whilst simultaneously learning new skills. Understanding how to adapt your professional knowledge to useful and impactful ends is a good reminder of your versatility, giving you confidence in your existing abilities while challenging you to push the boundaries of your expertise.

Teamworking

As a trustee at AdviceUK, you are part of a team and will have the opportunity to apply your unique skills and experience while also learning from others. Working in a team with a passionate team of individuals who bring diverse perspectives is often one of the most enjoyable aspects of the role. The ability to collaborate effectively with others and to challenge constructively the ideas of fellow trustees as well as those of the leadership team is essential to ensuring the Board's strategic decisions are fully informed, reasonable and effective.

'I gradually built up her confidence to start to apply for work more in-line with a career that would provide stability for her and her family and enable them with increased income to reduce their relative poverty, and move to a bigger home.'

- AdviceUK Advisor

Trustee role description

Location	London/Hybrid
Time Commitment	The role requires regular attendance at Board meetings (3 of these meetings are online and 3 face to face in London). Meetings run online from 5–6.30pm. Two in-person meetings are 1–3.30pm, with lunch available beforehand. The Board Strategy Meeting takes place in London in November, 9am–5pm, followed by a dinner. Board members travelling from afar can stay overnight before and after the Strategy Meeting. Beyond formal meetings, there are optional opportunities to get involved in aspects of the charity's work if you wish. The role of Treasurer would also involve attending the Resources Committee meetings which are held online four times a year, usually from 2-3.30pm. The overall time commitment is approx 1 day per month.
Salary	This is a voluntary role. Reasonable expenses can be claimed.

Overall objective

To add value to the business of the charitable company ("the Charity") by contributing experience, expertise and insight to the processes of determining its overall direction and scrutinising its operations.

General responsibilities for all trustees

The board of trustees is ultimately accountable in law for all aspects of the Charity's operations. It may delegate any or all executive functions but it will still be expected to:

- Agree the Charity's aims and objectives;
- Set clear strategic direction for the Charity;
- Determine plans for activities and associated financial plans;
- Establish and oversee appropriate controls and risk management frameworks.

Trustees share responsibility for all decisions. They must put the interests of the Charity before their own interests and should act only in the interests of the Charity and not on behalf of any other interest group.

Leadership and Direction

- Define the vision, mission and values of the Charity and ensure that these are realised and upheld.
- Define the strategic direction of the Charity.
- Ensure clear accountabilities within the Charity.
- Create a positive climate within the Board which fosters constructive challenge between the Board and Executive.

Strategy, Planning and Development

- Set key objectives and determine the outcomes required.
- Agree the business plan, budgets for both revenue and capital expenditure and a funding strategy that supports the achievement of the corporate strategy and business plan.
- Regularly review and monitor performance in relation to plans, budgets, controls and decisions.
- Ensure that assets are managed efficiently and effectively and that capacity is properly utilised to maintain long term viability and sustainability of the Charity.

Risk Management and Internal Controls

- Set the risk appetite and oversee a framework for the identification, management and review of risks.
- Contribute to the review and evaluation of strategic risks in both the external and internal environments and receive regular reports on these and emerging risks.
- Establish and oversee a framework of delegation and systems of internal control.
- Ensure that a positive culture of managing opportunities, threats and uncertainties is embedded throughout the organisation.

Probity and Integrity

- Ensure compliance with all relevant regulatory requirements.
- Approve the audited Financial Statements for each financial year prior to publication.

- Obtain assurance that the affairs of the Charity are conducted lawfully and in accordance with the chosen code of governance and the Charity's own probity policies.

Ambassadorial Role

- Promote the Charity at key events and other meetings.
- Establish constructive, high quality relationships with key current and potential partners and stakeholders, both internal and external.
- Monitor, safeguard and enhance the reputation of the Charity.

Specific responsibilities – Treasurer

The Treasurer's role is to provide financial leadership and oversight for the charity. This includes reviewing, approving, and presenting budgets as well as preparing and delivering clear financial reports to the Board. The Treasurer also ensures that effective accounting procedures and controls are in place, and works closely with the Chief Executive, fellow trustees, and the senior team to support sound financial management and decision-making.

A key priority for our new Treasurer will be to help us use our strong balance sheet to drive strategic growth and sustainability, while maintaining compliance and financial discipline.

- Understand the accounting procedures and key internal controls to be able to assure the Board that the charity's financial integrity is sound.
- Explain, guide and advise the Board on the key assumptions and financial implications of Advice UK's budgets, operational and strategic plans and keep the Board informed about its financial duties and responsibilities.
- Ensure that the organisation has an appropriate reserves policy and a realistic budget that meets the services' needs.
- Support the CEO and Head of Finance and People to provide advice on the preparation of budgets, accounts and financial statements for review and approval by the Board.
- Ensure that annual accounts are prepared in compliance with SORP (Statement of Recommended Practice) and submitted by the deadline to the Charity Commission and/or Registrar of Companies, and oversee arrangements for them to be audited or independently examined as required.

Who we're looking for

- A recognised financial qualification or equivalent knowledge gained by experience
- A good understanding of risk and confidence to advise as AdviceUK seek new areas of investment and (cautiously) increase financial risk
- The ability to take a strategic approach to financial planning and oversight, and to help non-financial colleagues understand these
- The ability to balance strategic planning with reactive decision making
- Excels in an entrepreneurial and fast-moving organisation, adapting effectively to change and new opportunities
- Highly developed communication and interpersonal skills, with a genuine enjoyment of working inclusively and collaboratively with people from diverse backgrounds
- Analytical ability, good independent judgement and a willingness to raise issues constructively and in the best interests of the charity
- A demonstrable interest in our work and commitment to serving the community
- A willingness to devote the necessary time and effort, to attend Board and subgroup meetings regularly and other meetings as appropriate, to read the paperwork and to be available for discussion by email/phone/video conference



ADVICE SAVES

Ready to apply?

[Eastside People](#) is supporting AdviceUK in the recruitment of these roles. Please [click here](#) to apply by submitting your CV and a cover letter, **both in Word doc format**.

Please use the cover letter (max 2 pages) as an opportunity to add to the information you have shared in your CV and ensure that you cover the following:

- Why are you interested in the Treasurer role at AdviceUK?
- Having read the information pack, what relevant experience and skills do you feel you would bring to this role? This might come from paid work, study, community or voluntary work or other experience.

You are welcome to send your cover letter in writing, or as a video or audio clip, alongside your CV. Any video or audio submissions should be emailed to johns@eastsidepeople.org.

If you would like a call to discuss the role or any of the content of this pack in more detail, please email John Sanger to arrange a convenient time at johns@eastsidepeople.org. Having a call of this kind will not influence the success or otherwise of your application.

We want you to have every opportunity to demonstrate your skills, ability and potential. If you have a disability or require reasonable adjustments during the application or interview process, please contact us so we can support you appropriately.

The closing date for applications is Friday 7th November. Shortlisting interviews with Eastside People will take place shortly after, and shortlisted candidates will have an **interview with AdviceUK during the week beginning 17th November.**

The successful candidate will be asked to attend two board meetings (as an observer) before their nomination as a trustee is agreed by the full Board. This allows time for candidates to see how the Board operates and grow their understanding of the role before making a final commitment. The next two Board meetings are the all day Strategy Meeting, on Thursday 27th November and an online Board meeting on Thursday 29th January.

Finally

We understand AI can be a helpful tool, but please use it with caution and ensure your application is personalised and accurate.



Eastside
People

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Eastside People is the trading name for Eastside Consulting Ltd. Company number:
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