

Charterpath™



Trustee Recruitment Candidate Information Pack Sept 2026



Eastside People

Charting a path between charities and volunteers with financial skills



Welcome from our CEO

Did you know that nearly half of small charities surveyed recently said their financial position was so critical that they were at risk of closure within the next 12 months?

That is terrifying - not only for the organisations themselves, but for the individuals, families and communities that rely on them.

At Charterpath, we believe finance professionals can be part of the solution. By volunteering their skills, they can give charities access to the financial expertise, confidence and capacity they need not simply to survive, but to thrive.

In the legal profession, pro bono work is embedded much more visibly into professional life. Yet we estimate that fewer than 1 in 10 finance professionals currently volunteer their skills. We see this not only as a challenge, but as an enormous opportunity: to make volunteering part of what it means to be a finance professional and to build a movement capable of delivering huge value for charities, society and volunteers themselves.

Becoming a Trustee of Charterpath offers an opportunity to help shape the strategy of an ambitious, growing charity and contribute to the financial resilience of charities across the UK. You will work alongside a committed and collaborative Board, build relationships across the finance and charity sectors, and gain or deepen your own board-level experience.

We are a small organisation with a bold ambition. That means our trustees do more than attend meetings: they bring ideas, experience, constructive challenge and connections, while helping us keep our charitable purpose and long-term sustainability firmly in view.

This is an exciting moment to join us. We have demonstrated the demand for what we do, built a growing and diverse community, and developed partnerships with leading employers and professional organisations. We are now focused on creating a sustainable platform from which Charterpath can significantly expand its reach and impact.

Thank you for considering bringing your experience and energy to Charterpath. I hope this pack gives you a sense of both the opportunity ahead and the contribution you could make.

We would be delighted to hear from you.

Alice Clementi

About us

Who we are

Charterpath is a registered charity, founded in 2021 with the social purpose of significantly increasing the proportion of finance professionals who volunteer for non-profit organisations.

Our services are provided free of charge to both finance professionals and non-profits, and any surpluses generated from sponsorship, fundraising and our operations are reinvested into furthering our mission.

Thousands of charities struggle to access the financial expertise they need to thrive. At the same time, thousands of finance professionals are looking for meaningful ways to contribute their skills. Charterpath exists to bridge that gap, helping charities build financial resilience while creating rewarding opportunities for volunteers. As a Trustee, you will help us scale that impact and ensure more charities have the financial confidence to focus on changing lives.

What we do

The mission of Charterpath is to inspire more finance professionals to volunteer their time and skills, connect non-profits with diverse and expert volunteers with financial skills, and engage with the wider sector so volunteering is part of every finance professional's career.

We deliver our mission through three strategies:

Inspire: sharing the benefits of volunteering through social media, events and thought leadership.

Connect: matching volunteers with meaningful opportunities and delivering training and practical resources that strengthen charities' financial capability.

Engage: working with employers, professional institutes and sector leaders to embed skills-based volunteering into finance career paths.

Our impact at a glance

- 3,500+ finance professionals engaged
- 40,000+ volunteering hours contributed
- £2m social value created
- 45% women volunteers
- 39% racially and ethnically diverse volunteers
- Supporting charities across the UK

GoogleReviews - Jobs Boards

“Many thanks to Charterpath for connecting us with a brilliant trustee. It was wonderful to be able to tap into a network of smart, dedicated people who are ready to commit to such roles.

Finding the right trustee can be one of the hardest parts of board life but Charterpath made the process so much easier to manage. You’ve both created something special. So, thank you!!”

- Iana Vidal, Cares Family

Roadshows/Webinars

“Over 30 colleagues attended and we were all inspired. Thank you, Charterpath, for making it easier to volunteer financial skills.”

- Laura Walker, Senior Director, Finance Transformation, ASDA

Training

“The materials were engaging, relevant, and valuable...It was incredibly beneficial to exchange best practices with peers who share similar challenges and goals.”

- Co-founder & CEO, small charity

Volunteering

“As an accountant, I now see how our core skills such budgeting and variance analysis directly can help charities spot inefficiencies early and keep programmes on track.

This experience also strengthened my sense of employability as I developed a clear communication of financial insights to non-finance Stakeholders”



An exciting time to join us

About the Board

Charterpath is governed by a Board of four trustees who bring a complementary mix of expertise from the finance, charity and professional services sectors. Trustees work closely with the CEO and wider team, providing constructive challenge, strategic guidance and effective oversight as Charterpath continues to develop and grow.

As a small, collaborative Board, every trustee has the opportunity to make a meaningful contribution, helping to shape our direction, strengthen our reach and maximise our impact.

The Board is supported by an Advisory Board made up of experienced leaders and specialists from across the finance and charity sectors. Acting as a strategic sounding board, the Advisory Board helps us test ideas, explore opportunities, anticipate external developments and extend our networks and influence. Formal governance responsibility remains with the Board of Trustees.



About the opportunity

We are seeking new trustees to help Charterpath build on its success and increase its impact across the voluntary sector. This is an exciting opportunity to join a dynamic, purpose-driven charity and use your expertise to help inspire, connect and engage finance professionals in volunteering.

We are particularly interested in hearing from individuals with experience in one or more of the following areas:

- Charity sector leadership and networks
- Community building, marketing and digital engagement
- Senior corporate, finance and partnership networks

You do not need to be a finance professional, as those skills are already well represented on the Board. More important is a genuine enthusiasm for our mission, a collaborative approach and a commitment to helping build a more financially confident charity sector.

Previous trustee experience is not required. We welcome applications from first-time trustees and will provide an induction and ongoing support to help you succeed in the role.

The Board meets remotely approx four times a year, with one in person trustee meeting a year, typically in London. The overall time commitment is approximately 2-3 hours per month.

We are committed to building a diverse and inclusive Board that reflects the communities and organisations we serve. We particularly welcome applications from people from underrepresented backgrounds and encourage candidates of all races, ethnicities, genders, sexual orientations, disabilities, ages, faiths and lived experiences to apply.

Further information about the role of a trustee can be found [here](#), and in more detail in the Charity Commission guidance for new Trustees: [The Essential Trustee: what you need to know, what you need to do \(CC3\)](#).

Why become a trustee

Becoming a trustee generally is a rewarding way to contribute to a cause you care about while developing valuable skills and experience. Research consistently shows that trustees gain as much from the role as they give, with many citing the satisfaction of making a positive difference, broadening their perspectives and feeling more connected to their communities.

Develop 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 trustee 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 a 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.

Grow personally and professionally

Trusteeship provides an opportunity to deepen your understanding of your strengths, gain new skills and apply your expertise in different ways. It can boost your confidence, expand your network and enhance your professional development.

Be part of a collaborative team

As a trustee at Charterpath you will work alongside a passionate team, bringing your own insights while learning from others. Constructive challenge, collaboration and shared commitment are at the heart of effective governance, making board service both impactful and enjoyable.

Trustee job description

Location	Remote, with one in-person trustee meeting a year typically in London.
Time Commitment	Part-time role, c.2-3 hours a month. Appointments are usually for a term of three years with the possibility of a three-year extension.
Salary	This is a voluntary role. Reasonable expenses can be claimed.

General responsibilities for all trustees

As a Trustee, you will play a key role in shaping Charterpath's strategy, supporting its leadership team and ensuring good governance.

All Trustees share responsibility for:

- Complying with our governing document, charity law and regulatory requirements
- Providing strategic guidance and constructive challenge to the leadership team
- Ensuring resources are managed responsibly and used to maximise impact
- Monitoring risks, approving the annual budget and reviewing financial performance
- Contributing actively to Board meetings and decision-making
- Acting as an ambassador for Charterpath with partners and stakeholders

Specific strengths

Boards are at their most effective when they have a wide range of skills and experience.

We are open-minded about the skills we are looking for alongside some specific skills below.

1. Charity sector insight & networks

Ideal for charity leaders, senior non-profit professionals and advisors

You may bring:

- Deep understanding of the voluntary sector and the challenges charities face
- Insight into trends in governance, funding and organisational development

- Strong networks across charity CEOs, CFOs, boards and sector bodies

How this helps Charterpath:

Your perspective will help ensure our work remains grounded in the real needs of charities. Your sector insight will strengthen our strategy and your networks can help us reach more charity leaders and secure opportunities that support our mission.

2. Community building & digital engagement

Ideal for digital community managers, content creators, social media leads, communication/marketing professionals, engagement strategists.

You may bring:

- Experience growing online communities or professional networks
- Skills in developing inclusive, active and supportive spaces
- Understanding of user journeys and how to drive engagement across platforms/events

How this helps Charterpath:

Your experience will support our ambition to build a vibrant, connected community of volunteers - through digital channels, events, mentoring and peer-to-peer engagement.

3. Senior corporate & finance and partnership networks

Ideal for CFO's, senior finance leaders, corporate partnership leads, ESG/CSR heads.

You may bring:

- Strong networks across the finance profession, corporates and professional bodies
- Experience with business partnerships, corporate engagement or sponsorship
- Ability to act as an ambassador for Charterpath within the profession

How this helps Charterpath:

Your senior relationships can help us deepen corporate partnerships, expand employer engagement and embed volunteering as a rewarding part of the finance career journey.

Who we're looking for

You do not need prior trustee experience - we welcome first-time trustees and will support you to develop in the role.

Essential

- A genuine commitment to Charterpath's mission
- Strong communication skills and a respectful, inclusive approach to building relationships
- Comfortable using digital tools (video calls, shared documents, etc)
- Reliability - prepared for meetings, willing to contribute and to support occasional priority initiatives (e.g. introductions, advice, attending an event)
- Commitment to equity, diversity and inclusion, with an understanding of its importance in charity governance

Desirable

- Experience in at least one of the three priority areas (charity leadership, community/digital engagement, senior corporate/CFO-level networks)
- Ability to build strong relationships across sectors (charity, corporate, professional bodies)
- Experience supporting an organisation through a period of growth, change or scaling

Practicalities

Charterpath's Board of Trustees meets approximately four times a year, with meetings typically lasting 1–2 hours. From time to time, the leadership team may invite you to support with ad-hoc tasks between meetings, for example, making introductions, representing Charterpath at events or offering occasional advice in your area of expertise. Any additional involvement will be entirely at your discretion.

Reasonable travel and out-of-pocket expenses will be reimbursed.

Charterpath.

Not every superhero wears a cape!

Making connections



Meet Becky, she is working with one of the largest homeless charities as trustee treasurer, helping them achieve more in really challenging times.

Charterpath. Make a difference with charterpath.org.uk

Making connections



Meet Ali, he used a corporate charity day to help support women across London who have survived trafficking or exploitation.

Charterpath. Make a difference with charterpath.org.uk

Charterpath is on a mission to inspire more finance professionals to volunteer their superpowers.



Inspired by Becky and Ali to help a charity in need?

Scan the QR code to chart your path to a life changing volunteer role and supercharge your CV whilst you're at it.

Ready to apply?

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

In the supporting statement, please tell us:

- Why are you interested in joining Charterpath as a Trustee?
- What skills, experience or perspectives would you bring to the Board? 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 bernice@eastsidepeople.org.

If you would like a call to discuss any of the roles in more detail, please email Bernice Rook to arrange a convenient time at bernice@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 13th Nov. Following this, candidates will have an opportunity for an informal conversation with Eastside People, with shortlisted applicants invited to meet the Charterpath team later in November.

Charterpath is committed to creating a diverse and inclusive Board. We welcome applications from people of all backgrounds and lived experiences and are committed to fair and accessible recruitment processes.

Finally

We recognise that AI can be a helpful tool, but please use it with care and ensure your application is accurate, personal, and genuinely reflects you. We do not use AI in our sifting or selection process - a human reviews every application!

If you know anyone else who might be interested, please do share this information pack with them.



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