



Leading the way
for charity finance

Become a Trustee of Charity Finance Group

Help shape the future of charity finance

Thank you for your interest in becoming a trustee of Charity Finance Group (CFG).

CFG exists to inspire a financially confident, dynamic and trustworthy sector. We believe that when charities have strong financial leadership, governance and decision-making, they can maximise their impact and better serve their beneficiaries.

We serve our members and the wider charitable sector, bringing us into contact with an incredibly diverse range of charitable organisations and the communities and people they serve. Our community of over 11,000 charity finance professionals work in charities and social purpose organisations of every size, location and stage of maturity, covering every charitable purpose.

As a trustee, you will play a vital role in shaping CFG's strategic direction, ensuring effective governance and helping us achieve our charitable purpose. A diversity of voices, experience and talent among our trustees is vital. **There is no such thing as a 'typical' CFG trustee.**

We are looking for people who share our commitment to a stronger charity sector and who will bring fresh perspectives, constructive challenge and a passion for supporting our members and shaping the wider sector.

About CFG

CFG is the charity and membership body for charity finance professionals and leaders.

Our members are charities, social change and public benefit organisations of every size and cause area. Together our members manage a significant proportion of the sector's resources and our community of charity finance professionals plays a critical role in ensuring organisations are financially resilient, accountable and effective.

Our vision is:

A financially confident, dynamic and trustworthy charitable sector.

Our mission is:

To put finance at the heart of social change organisations, helping every organisation make the best possible use of its resources to achieve greater impact.

Our values

Everything we do is guided by three values:



Integrity: We are open, honest and accountable in our actions and decisions.

Support: We work collaboratively and create an environment in which people can succeed and thrive.

Dynamism: We are ambitious, curious and committed to positive change.

These values shape how we operate as an organisation and how our trustees work together as a board.

Our commitment to equity, diversity and inclusion

CFG believes that better decisions are made when a range of perspectives, experiences and backgrounds are present around the table.

We are committed to building a board that reflects the diversity of the wider charity sector and the communities our sector serves.

We particularly welcome applications from people who are currently under-represented in charity governance and leadership roles, including but not limited to:

- people from Black, Asian and minoritised ethnic communities,
- disabled people and people with long-term health conditions,
- LGBTQ+ people,
- younger professionals and first-time trustees,
- people from a wide range of socio-economic backgrounds, and/or
- people working in smaller charities or outside London and the South East.

We recognise that there is no single route into trusteeship and that valuable experience can be gained through employment, volunteering, lived experience, professional practice and community leadership.

We encourage anyone who believes they can contribute to CFG's mission to consider applying.

Our strategy

We believe charities are most effective when finance is at the heart of informed decision-making, organisations benefit from strong governance and leadership, finance professionals have access to high-quality learning and support, and the sector operates within a supportive environment.

Our current strategy focuses on three connected goals:

- **Being the sector's 'go-to' body** for charity finance leadership, expertise and practical support.
- **Inspiring financial leadership**, helping organisational leaders and charity finance professionals at every stage of their career, whatever their background or job title, to develop the confidence, knowledge and influence needed to drive impact.
- **Convening powerful networks** that bring people together to share learning, tackle challenges and strengthen the sector as a whole.

Our trustees help ensure CFG remains focused on these ambitions while supporting the organisation to grow its impact, strengthen its sustainability and continue delivering value for members and the wider sector.

As we move into 2027/28, CFG's areas of strategic and operational focus will centre on

- reviewing and refining our strategy,
- our ambitious targets on driving up engagement with our members, corporate partners and other stakeholders, and
- maximising and measuring CFG's impact across the voluntary and charitable sectors.

We know we make a difference to so many individual charities, and our sector as a whole, and we want to celebrate that.

The role of the Board

The Board of Trustees has overall responsibility for CFG's governance, strategy and financial sustainability.

Trustees work collectively to:

- set CFG's strategic direction,
- oversee organisational performance,
- ensure effective stewardship of resources,
- monitor risk and organisational resilience,
- support and challenge the executive leadership team,
- ensure compliance with charity and company law, and
- safeguard CFG's reputation and values.

Trustees act in the interests of CFG and our charitable purpose at all times.

Eligibility

Before you read on, a word about eligibility. To stand for election, you must:

- work for a charity that is a full member of CFG, and
- be proposed by an individual from a member charity, that is not the one you work for (if you feel that you will struggle to find an appropriate proposer, then please get in touch and we can assist you), and
- be eligible to be a charity trustee and company director (see declaration on the application form).

These requirements are set out in CFG's Memorandum and Articles of Association.

Some individuals are disqualified from acting as charity trustees under the Charities Act 2011. You can learn more about this through the Charity Commission's Guidance, [Charity trustee: what's involved \(CC3a\)](#)

Successful candidates will be asked to confirm their eligibility before appointment.

What makes an effective trustee?

Effective trustees bring different strengths, but we particularly value people who:

- are curious, willing to learn and open to different perspectives,
- can think strategically and focus on long-term impact,
- contribute constructively, offering both support and appropriate challenge,
- work collaboratively and show sound judgement, integrity and accountability,
- act in the best interests of the organisation and its beneficiaries, and
- champion inclusive leadership and help create an environment where different voices are heard.

You do not need previous trustee experience to apply. Valuable governance skills can be developed through professional experience, volunteering, experience and community involvement. Full induction, support and development opportunities will be available to successful candidates.

Who we are looking for

There is no such thing as a 'typical' CFG trustee. We are looking for a diverse range of voices and a Board with a broad mix of backgrounds and viewpoints. Whether you are an experienced finance leader or building your career in charity finance, we want to hear from you. Some of the most valuable contributions come from people who bring fresh perspectives, different experiences and insights from charities of different sizes and contexts.

The areas below highlight some of the **additional** skills, knowledge and perspectives that would be particularly valuable to the Board at this time. They are a guide rather than a list of requirements, so please do not be discouraged from applying if they do not fully reflect your experience.

- **Strategic leadership experience:** Experience helping organisations navigate change, growth, uncertainty or transformation, and/or
 - **Financial and commercial expertise:** Finance, audit, investment, treasury, business planning or commercial experience, and/or
 - **Digital and technology insight:** Knowledge of digital transformation, artificial intelligence, cyber security, data governance or technology-enabled services, and/or
 - **Membership and customer experience:** Experience of member-led organisations, professional bodies or customer-centric service design, and/or
 - **People and culture:** Experience in organisational development, leadership, culture, talent, workforce planning or EDI, and/or
 - **Public policy and influencing:** Understanding of public affairs, regulation, advocacy, campaigning or stakeholder engagement, and/or
 - **Lived experience:** Personal or professional experiences that may help the Board better understand the opportunities and challenges faced by charities and finance professionals across the sector.
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Time commitment

The expected commitment is approximately:

- four board meetings per year – usually two in person in London, and two online meetings, each lasting 2-3 hours during the working day,
- one board strategy day per year, aligned with one of the in-person board meetings,
- participation in one committee, task-and-finish group or working group(s),
- preparation and reading before meetings, and
- ideally, participation in one or both of CFG's Annual Conference, usually held in early summer in London, and CFG's Awards Dinner, usually held in early October in London and aligned with one of the in-person board meetings.

Trustees may also be offered the chance to attend CFG's other events, online and in person, during their time in office.

In addition, we offer our new trustees an induction into their role and being a part of CFG, which takes approximately 8 hours – including online time during the working day, and required reading.

We estimate the total time requirement is between six and nine days per year.

Trustees are elected for an initial three-year term and may be eligible for re-election for one further term in accordance with CFG's Articles of Association.

Supporting our trustees

We want trustees from all backgrounds and circumstances to be able to participate fully in Board life. To help remove practical barriers to involvement, CFG arranges and pays directly for agreed travel and accommodation for trustee meetings wherever possible, so trustees do not need to incur costs personally and reclaim them later.

We are committed to making trustee meetings as accessible and inclusive as we can. If you require adjustments or additional support to enable you to participate fully, we encourage you to discuss these with us. We will work with you to identify reasonable and practical solutions wherever possible.

Election process

Trustees elected by members are appointed in accordance with CFG's Articles of Association.

This year we have vacancies for up to four new trustees.

Our nomination and election process is being provided through PIN Communications. Nominations and diversity monitoring data are sent in through the online portal.

The process and timetable is as follows.

Date	Action
Wednesday 28 October 2026	Closing of Nominations
Shortly after Wednesday 28 October 2026	Board confirms valid nominations and whether a ballot is required
Monday 2 November 2026	If required, ballot papers issued to members
Tuesday 1 December 2026	Close of ballot
Wednesday 2 December 2026	Results of ballot shared with CFG Board of Trustees
Thursday 3 December 2026	General Meeting to elect trustees and declare any ballot result
Thursday 3 December 2026	First Board Meeting including newly elected trustees

Why become a CFG trustee?

Being a CFG trustee is an opportunity to help shape the future of the charity sector while developing your own understanding, skills and perspectives.

As a trustee, you will have the opportunity to:

- contribute to CFG's mission of putting finance at the heart of social change organisations,

- help strengthen financial leadership, governance and resilience across the sector,
- influence the strategic direction of CFG and the support it provides to members,
- work alongside people with a wide range of experiences, perspectives and expertise,
- learn more about charity governance and strategic leadership,
- broaden your understanding of the opportunities and challenges facing charities today,
- build relationships with peers and sector leaders from across the UK, and
- make a meaningful contribution to an organisation that supports thousands of charity professionals and the organisations they serve.

Most importantly, becoming a trustee is an opportunity to use your experience, perspective and commitment to help CFG achieve greater impact for its members, the wider sector and ultimately for the communities and causes our sector supports.

Interested?

We would particularly encourage applications from people who may not see themselves as a "typical trustee".

If you are passionate about CFG's mission and believe you can contribute to the Board's work, we would love to hear from you. If you'd like an informal discussion, please email [Becky Nall-Cain](#), our executive assistant, who will arrange a call for you with one of the leadership team or one of our trustees.

Different perspectives make us stronger. Your experience, skills and insight could help shape CFG's future.

General contact details

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