

Trustee Recruitment Pack - 2026

Join the Board of Charity Excellence and help empower the UK voluntary sector





Welcome

"In ten years and with very little funding, we've grown to be the UK's largest trusted charity network - a free, one-stop-shop platform that enables tens of thousands of non-profits across the UK to access the funding, and free help and resources they need.

But we must now transform what we do to meet the huge and growing challenges they face. Small frontline charities are facing a severe 'scissors effect'—surging demand and a growing funding gap.

*As we roll out **Charity Excellence 2.0**, we are transitioning from an agile founder-led tool into a sustainable, UK wide social franchise that will deliver what our community has told us they want. We are seeking around six new trustees to bring fresh energy, diverse lived experience, and specialist skills to our Board to help lead this next chapter."*

Ian McLintock

Founder & CEO, Charity Excellence

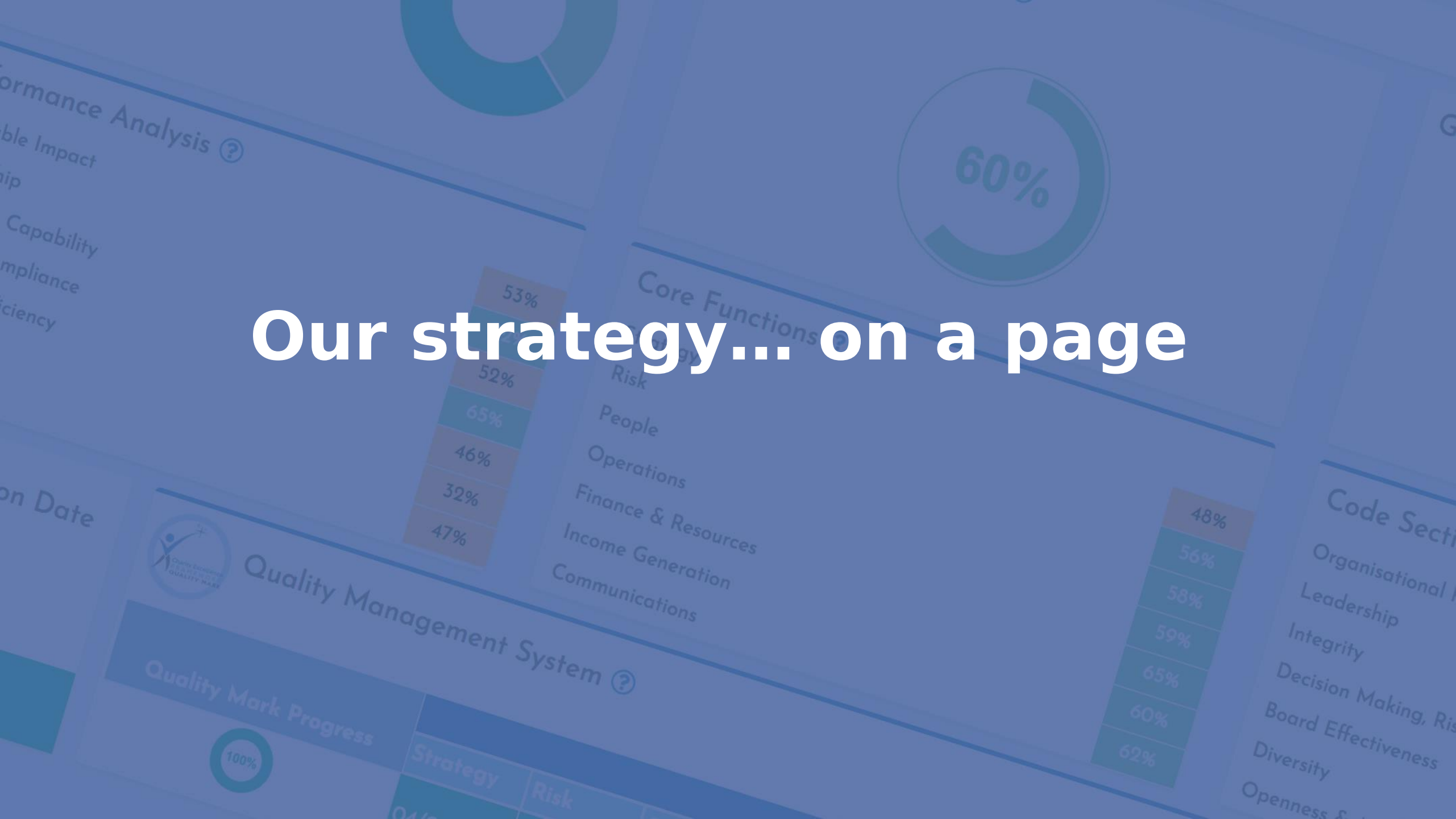
Who We Are & Our Impact

Empowering UK Frontline Charities

- **Our Mission:** To drive positive systemic change by providing a free, agile, one-stop-shop platform that enables frontline charities to be their best.
- **Our Reach:** An active weekly newsletter community of **100k+ subscribers** and **60,000+ active users**.
- **Direct Support:** Over **5,800+ enrolled learners** on our Learning Platform and thousands downloading open-access policies and operational toolkits.
- **High Trust:** Consistently maintaining strong sector trust (80%+ positive rating) by remaining authentically practical, upstart, and empowering.
- **Find Out More:** [Watch our video](#) (2 mins 30 secs) and read [what our community says about us](#).

Strategic Context & Charity Excellence 2.0

- **The Scissors Effect:** Rising operating costs and funding cuts require frontline charities to operate with radical efficiency.
- **AI & Technology Transformation:** Proactively adapting to the AI shift—transitioning from basic web search dependencies to distributed AI-enabled data tools, chatbots, and APIs.
- **Major Sector Initiatives:** Unlocking unclaimed Gift Aid (£560m potential sector recovery), online risk directories, and open-access Help Finder infrastructure datasets.
- **Social Franchising:** Partnering with regional infrastructure bodies and specialist providers to pair our digital reach with high-touch human support.
- **Succession & Sustainability:** Building a diversified funding model (grants, partnerships, commercial/premium offerings) to secure a resilient team and structured leadership succession.



The background image is a blue-toned dashboard with several data visualization elements:

- Performance Analysis**: A donut chart at the top center.
- 60%**: A large circular progress indicator in the top right.
- Core Functions**: A list of functions with associated percentages in a bar chart:
 - Technology: 53%
 - Risk: 52%
 - People: 65%
 - Operations: 46%
 - Finance & Resources: 32%
 - Income Generation: 47%
 - Communications: 48%
- Code Section**: A list of sections with associated percentages in a bar chart:
 - Organisational: 56%
 - Leadership: 58%
 - Integrity: 59%
 - Decision Making, Risk: 65%
 - Board Effectiveness: 60%
 - Diversity: 62%
 - Openness &...
- Quality Management System**: A section with a logo and a "Quality Mark Progress" bar at 100%.
- Strategy** and **Risk**: Headers for data tables at the bottom.

Our strategy... on a page

Our Vision is...

to enable every UK charity to use limited resources far more efficiently and effectively, increasing impact and public confidence.

Strategic Pillars (How we will work)

- ✓ Sustain the core system as a singular, streamlined resource hub.
- ✓ Innovate in ways that improve user accessibility and meet charity needs
- ✓ Develop our business model through grant and commercial partnerships / franchising
- ✓ Scale our network with enough of a focus on charity needs

Key Audiences (Who we serve)

- 📢 Frontline Charities: providing the "practical help" and "funding finder" tools they need to survive and thrive.
- 📢 Infrastructure Charities: supporting the wider network of bodies that assist charities.
- 📢 Sector Partners: Service providers and corporates who benefit from the data, access, and value generated by our scaled network.

Brand (Who we are)

- ❓ Brand promise: "the number one place online for charities to find what they need to be excellent at what they do."
- ❓ Brand Personality: authentically practical; agile & upstart; empowering.



Our Mission is...

to drive positive systemic change by providing a free, agile, one-stop-shop platform that empowers frontline charities to be their best.

2026-27 Priorities (What next)

- 📋 Brand refresh: refresh the newsletter, edit the website and service offer in line with the new brand and take steps to improve user experience
- 📋 Core capacity: trial fundraising to sustain a core team of 2, rising to 3.
- 📋 Governance: recruit trustees, review our governance for the future
- 📋 Innovation projects: Unlocking £560m of Gift Aid , AI offer for infrastructure partners
- 📋 Social franchising: Widen our learning offer through revenue-generating partnerships

2030 Target KPIs (What we will achieve)

- 📈 Engagement: Supporting and growing our community of newsletter subscribers to **150,000.**
- 📈 Trust: Sustain our high trustworthiness by achieving an **85%** rating (baseline: 82% Strongly Positive, i.e. 8 out of 10 or higher) through authentic, committed support.
- 📈 Utility: Raise the usefulness of our services to the same level of **85%** (baseline: 74% Strongly Positive overall, but with some services such as AI and technical tools lagging at 52%)
- 📈 Succession: Develop income of **£250k** pa to sustain a team of four people, with the founder reporting into a new CEO as Innovation Lead

Governance & Board Structure

Current Board:

- Ed Mayo – Trustee
- Sarah Swaysland – Trustee
- Amit Bansal – Treasurer
- Hybrid meetings (approx. 4–6 per year online, with flexible scheduling).

Staff:

- [Ian McLintock](#) – Founder & CEO
- [Kate Hillier](#) – Digital and AI Manager
- Polly Shute – Fundraising Consultant

Role Profile & What We Offer



- **Strategic Leadership:** Guiding our transition to a scaled social franchise and sustainable operating model.
- **Mentorship & Oversight:** Providing advice, constructive challenge, and the option of mentoring support for newer staff.
- **Time Commitment:** Approximately 4 hours per month (including Board preparation, meetings, and occasional advice).
- **What We Offer You:** An opportunity to shape UK-wide charity infrastructure, pilot cutting-edge charity AI governance, and expand your own governance leadership in an agile, high-impact environment.

Specialist skills we are looking for

You don't have to have been a trustee before, but we do expect you to be a team player and have an interest in our core purpose. We are looking for trustees with a commitment to values of integrity, equality and collaborative working. We are looking for differences on our Board as well as alignment, so that we can be good together. If you have any of these skills, we would particularly welcome your application:

- **Small Charity Lived Experience:** Ground-level understanding of running small, resource-constrained non-profits.
- **Strategy & Organisational Growth:** Experience scaling social ventures, business models, or federated/franchise networks.
- **Technology & AI Foresight:** Practical awareness of emerging AI applications, digital transformation, data architecture, or product management.
- **Business Development & Funding:** Track record in corporate partnerships, grant generation, earned-income models, or commercial sponsorships.
- **Marketing & Email Engagement:** Deep knowledge of email list growth, digital content marketing, and brand engagement.
- **HR & Staff Mentoring:** Background in supporting team development, contractor-to-staff transitions, and people policies.
- **Neurodiversity & Inclusion:** Lived experience or understanding of neurodiversity, ensuring our tools and workplace culture remain inclusive and accessible.

How to apply

- Submit a **CV** and a short **expression of interest / cover letter** outlining your background and the skills you would bring.
- Applications should be sent to: ian@charityexcellence.co.uk
- **Equal Opportunities:** We actively welcome and support applicants requiring reasonable adjustments or neurodivergent accommodations throughout the selection process.
- **Informal Enquiries:** Potential applicants are welcome to have an informal chat prior to application.
- **Indicative Timetable (Customisable):**
 - **Closing Date:** 5pm, 31 October 2026.
 - **Interviews (Online):** November 2026
 - **Induction:** November – December 2026
 - **First Formal Board Meeting:** January 2027

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