

Bank Workers Charity

Supporting the health and wellbeing of the banking community

Trustee

Applicant information pack

Contents

Introduction	Page 2
Key strategic priorities	Page 3–4
Our values	Page 4
Role profile	Page 5–7
Timetable	Page 7

Introduction

Thank you for your interest in joining the Trustee Board at Bank Workers Charity.

Our mission, as laid out in our strategy, is to provide guidance, practical support and financial assistance for bank workers, past and present and their dependents, helping them to overcome life's challenges. We do this by providing advice and information, counselling services, financial support, and by working closely with banks to promote the wellbeing of their staff.

We've been here for the banking community for over 140 years – and with demand for our support growing, we're needed now more than ever.

We're recruiting two Trustees to join our Board and help us deliver our mission: to support and improve the wellbeing of UK bank workers – past and present – and their families. Our focus is on those most in need. With over 300,000 people currently working in the sector, and 1.1 million employed in the last 20 years, demand for our services is rising.

We're particularly keen to strengthen our Board by appointing an individual who has experience of working in a senior role within a bank, managing a business unit and demonstrating strong commercial and people skills

Applicants should be progressive, forward-thinking and values-led, with the capacity to commit approximately 12 hours a quarter to participate fully in subcommittees, Board meetings and strategic activities.

Previous experience as a Trustee isn't required, but you will need to have worked at a senior level in a bank managing a business unit. Full training and support will be provided to help you fulfil your duties as a Charity Trustee. We welcome applications from all sections of the wider community.

For a confidential discussion about the role, please contact our Chief Executive, Jonathan Saverimuttu, at: tr-rec@bwcharity.org.uk.

To apply, please email your CV and a personal statement to tr-rec@bwcharity.org.uk, outlining:

1. Why you'd like to be a Trustee
2. What you hope to gain
3. What you hope to offer

The deadline is **5pm on Monday 8 September 2025**. Please also include contact details for two referees. These should be people who have known you in a professional capacity for at least two years. We will only contact your referees after an interview, and with your consent.

Candidates will be notified if they have been invited to interview by **Tuesday 16 September 2025**. If you haven't heard from us by this date, please assume you've been unsuccessful on this occasion.

For further information about the Charity, visit: <https://bwcharity.org.uk/>

Our strategy for 2025–28

Bank Workers Charity has been supporting the banking community since 1883.

Founded as the Bank Clerks' Orphanage, we've evolved to meet the changing needs of the sector, providing an ever-broadening range of support to past and present bank workers and their families – support that's free, confidential, and independent of the banks themselves.

Today, we continue that mission in a vastly different world. The rising cost of living has placed many bank workers under pressure, increasing demand for our services at a time when financial resources are more constrained than ever.

Our 2025–28 strategy is a response to that challenge. It marks a shift from growth-focused ambitions to a more sustainable, impact-driven approach. Our priority is to support those most in need, ensure we use our resources wisely, and build long-term resilience into everything we do.

Values and mission led

Our values shape how we work and are a key part of how we recruit both employees and volunteers. We aim to work with Trustees, staff, partners and suppliers who share them.

Our organisational values are:

- **Integrity** – our clients are at the heart of everything we do
- **Caring** – we care about our colleagues and making a difference in people's lives
- **Respect** – we respect the people we work with and the people we work for
- **Achievement** – we take pride in what we do and work to achieve the best outcomes
- **Fairness** – we treat people fairly and as individuals

As a Trustee of Bank Workers Charity, you'll be expected to role model these values.

Building on these values, we are also reinforcing our organisational identity with new vision and mission statements to cultivate a shared sense of purpose:

- **Our vision:** For bank workers, past and present, and their families, to be supported in times of need
- **Our mission:** To provide guidance, practical support, and financial assistance, helping members of the banking community to overcome life's challenges

Over the next three years, we will:

- Embed our vision and mission across all areas of our work, making sure our support reaches those who need it most
- Strengthen our approach to equity, diversity and inclusion (EDI) to ensure our

Applicant pack: Trustee

services are accessible and responsive to all bank workers

- Work to a recognised benchmark of service excellence to ensure we provide high-quality, effective support that meets the needs of bank workers and their families

Client-focused and evidence-based

Understanding the evolving needs of bank workers is critical to ensuring our services remain relevant and effective. We will:

- Conduct regular impact assessments to measure the effectiveness of our services, and use data to drive continuous improvement
- Undertake comprehensive service reviews, ensuring we allocate resources where they can have the greatest impact
- Strengthen our role as a thought leader in wellbeing, positively influencing how banks support employee wellbeing and giving bank workers the tools to build their own resilience

Building a resilient organisation

To sustain our impact and continue meeting the growing needs of our community, we will:

- Build our fundraising strategy, focusing on long-term financial sustainability while maintaining ethical fundraising
- Improve operational efficiency, streamlining our internal processes to maximise resources and reduce costs
- Strengthen governance and risk management, ensuring the organisation remains agile and adaptable in response to financial and external pressures

Looking ahead

This strategy ensures that Bank Workers Charity remains a lifeline for those facing financial and wellbeing challenges. By focusing on sustainability, impact, and resilience, we'll continue to make a meaningful difference in the lives of bank workers and their families – now and in the years ahead.

Role profile

Trustees are collectively responsible for:

- Fulfilling the general and specific duties of charity trustees – ensuring the organisation is well run, operates within legal and financial requirements, and meets the standards expected of a UK registered charity and company
- Providing leadership, shaping our strategic direction, and ensuring we stay focused on delivering our charitable aims as set out in our Articles of Association
- Setting policies and practices that align with our strategy and monitoring progress towards agreed goals
- Safeguarding the charity's name and values
- Protecting and managing our resources, ensuring the responsible investment of funds and maintaining financial stability
- Appointing the CEO and monitoring their performance
- Championing our work by supporting our activities, building connections, and promoting what we do within their networks
- Bringing valuable perspective by constructively challenging the Executive, supporting its work, and contributing to specific projects where they have relevant skills or interests

Knowledge and experience – you'll bring:

- A broad understanding of the health and wellbeing issues facing the banking community – and the role organisations like Bank Workers Charity can play in providing support
- Familiarity with the principles of good governance, including the respective roles of the Board and Executive, and how they can work effectively together
- Experience of managing a business unit at a senior level within a bank
- Previous experience on a Board or other governing body is desirable, but not essential

Skills, values, and behaviours – you'll be:

- Strategically minded, with the ability to focus on key organisational priorities and long-term effectiveness
- A collaborative team player with strong interpersonal and relationship-building skills
- Genuinely committed to equality, diversity and inclusion – and confident applying that commitment in a Trustee role
- Commercially minded with people-focused leadership
- Aligned with the mission and values of Bank Workers Charity

Terms of appointment

- This is a voluntary, unremunerated position, though reasonable travel and related expenses will be reimbursed
- Trustees are expected to prepare for and attend four Board meetings and four Committee meetings per year, as well as in-person strategy days
- The initial term of office is up to three years, ending in the third November after appointment.
- Trustees may serve up to two additional terms of three years, in line with our Articles of Association

Eligibility Criteria

We welcome applications from all sections of the community. To be eligible, you must meet the following criteria in line with Charity Commission and Companies House requirements:

- Be over the age of 18
- Not be disqualified under the Charities Act 1993 (section 72), or previously removed from trusteeship by a Court or the Charity Commission
- Not be disqualified under the Company Directors' Disqualification Act 1986

- Not have been convicted of an offence involving deception or dishonesty (unless the conviction is spent)

Timetable for recruitment

- **Applications close:** 5pm, Monday 8 September 2025
- **First-round interviews:** 17, 18 and 19 September 2025 – with the CEO and an HR consultant
- **Second-round interviews:** Between 29 September – 1 October 2025 – with two or three current Trustees
- **Meeting with Chair of the Board:** Between 6 – 15 October 2025.
- **Board appointment:** 12 November 2025