



# Finance Trustee Recruitment Pack

# INTRODUCTION

Upbeat Communities are recruiting for a new trustee with recent financial management experience to support the growth and development of the charity. This pack provides potential candidates with all the information they should require to apply. Please visit [www.upbeatcommunities.org/trustees](http://www.upbeatcommunities.org/trustees) to access all the relevant documents and submit your application.

# WELCOME

We are delighted you are interested in considering being a trustee for Upbeat Communities and supporting our work of empowering refugees to thrive. As someone who has been involved in the charity almost since it began, and from my experience of being a trustee for a number of other organisations, I recognise the great value of a strong board of trustees, who can use their skills and experience to help direct and guide the charity to continue to bring transformation to the lives of many people.

We hope this trustee recruitment pack provides all the information needed to support you in applying for a role as a trustee.

With thanks,



Andrew Jackson  
Chief Executive



# OUR PURPOSE

Upbeat Communities exists to support the welcome and integration of those who have been forcibly displaced and have found themselves in the UK. This includes:

- those claiming asylum
- individuals and families arriving through the UK's resettlement schemes (including the UK Resettlement Scheme, the Afghan Citizen Resettlement Scheme or the Afghan Relocations and Assistance Programme)
- people arriving on visas through the Homes for Ukraine scheme or the Hong Kong BNO scheme

The organisation was founded in response to the needs of those seeking sanctuary in the UK and the stories they shared of their lives and their journeys. Through building relationships with those from asylum seeker and refugee communities we were able to identify their needs and the best ways to respond.

We believe that making those who are fleeing war, persecution, and conflict feel welcome will give the best possible chance of integration, support and opportunities to rebuild their lives. One of the best resources a refugee can have to help them settle in their new home is a good social network. Friendships and connectedness can help overcome the many challenges faced by those seeking refuge.

With this aim, we want to help connect refugees into community. We want to see strangers become neighbours, so that refugees can thrive as they rebuild their lives.



The charitable objects of the charity are:

1

To relieve the charitable needs of migrants, refugees and asylum seekers in particular those coming to the United Kingdom, by provision of advice, support and assistance organising educational programmes and such other activities as the trustees deem fit as a means of:

- a)** advancing their education and training
- b)** relieving them from financial hardship and unemployment
- c)** advancing them in life and assisting them with the adaption within a new community.

2

To promote racial harmony for the public benefit by:

- a)** promoting activities to foster understanding between people from diverse backgrounds
- b)** advancing education and raising awareness about different racial groups; including the issues faced by migrants, refugees and asylum seekers to promote good relations between persons of different racial groups



# HISTORY OF THE CHARITY

Upbeat Communities has been supporting those seeking sanctuary since 2005.

We began by giving practical help and support to refugees and asylum seekers, which rapidly grew into projects that built cohesion among the whole community. One of the first major projects was to set up a community café in a multicultural part of the city, providing employment and volunteer opportunities for refugees, with a space for community activities, arts, and family events. From this initial work we developed a range of services, delivered with a number of different partners including The British Red Cross, Refugee Action, City of Sanctuary, Derby City Council, Derbyshire County Council, and the Lincolnshire Resettlement Partnership.

The organisation, initially established as a social enterprise, was founded by a local church, and remained closely connected to the church for a number of years. However, we are now a registered charity (registering with the Charity Commission in 2015) and we are independent from our founding member.

## OUR VISION

To see positive thriving communities where every refugee can contribute and make the most of opportunities.

## OUR MISSION

To empower refugees to thrive as they rebuild their lives.

# ETHOS AND VALUES

Upbeat Communities' Christian ethos is the driving force behind why we were started and the basis for the values that we hold as a charity. Jesus's primary message was 'to love your neighbour as you love yourselves'. We seek to embody this by showing love and compassion to refugees who have been displaced by war, conflict or persecution.

We are a faith-based, however we are not a faith-biased charity, and we do not promote religion; we support asylum seekers and refugees from all faiths or none and our staff team and volunteers are made up of people from different faiths.

We are looking for trustees who can support our ethos and values but do not expect all applicants to be from the Christian faith.

Our values have been shaped by our ethos:

We work to **WELCOME**

We create **COMMUNITY**

We are inspired to act with **INTEGRITY**

We exist to **EMPOWER**

We are committed to **CREATIVITY**

We run on **RELATIONSHIPS**

We are proud to be **PROFESSIONAL**

We have **COMPASSION** at our core



# FINANCIAL MANAGEMENT OF THE CHARITY

Upbeat Communities has outsourced all its financial processes to a specialist charity finance organisation, Beehive Accounts. They are based in Derbyshire and provide face to face and online support. Their skilled and experienced team support us with every level of financial management including:

- Bookkeeping
- Payroll
- Monthly management accounts
- Strategic financial management
- Finance Director role (attending finance sub-committee meetings)
- Investments
- Annual budget setting
- End of Year Accounts

Our Leadership Team also take an active role in the financial management of the charity, managing their own budgets and liaising regularly with the team at Beehive.

## ROLE PROFILE

Our trustees play a vital role in making sure that Upbeat Communities achieves its core purpose. They oversee the overall management and administration of the charity, and they also ensure we have a clear strategy and that our work and goals are in line with our vision. Just as importantly, they support and challenge the leadership team to enable Upbeat Communities to grow and thrive, and through this, empower refugees to thrive.

Through regular meetings, strategy days and written reports provided to the board, trustees are able to set the direction of the organisation, develop its strategic objectives and support and keep the staff team accountable in delivering on these strategic goals.

Trustee meetings are currently held every 2 months either in person in Derby or online (hybrid). We have an annual strategy away day (the next one planned for Feb 2024) and trustees are also invited to be part of our sub-committees.

Trustees are requested to be available to attend occasional 'unscheduled' meetings or engage in email communications which address urgent business as it arises, join working groups when needed and spend time preparing for meetings by reading and considering the papers circulated before meetings.

## Benefits of being a Trustee

We believe being a trustee of Upbeat Communities offers a number of fantastic benefits:

- Strategic decision-making that positively impacts the lives of over a thousand asylum seekers and refugees every year
- Supporting an innovative, talented and passionate staff team as they develop our work and explore new services and ways of working
- Being part of a committed and focused trustee team working to see the charity grow
- Using your skills, experience and passion to contribute to an effective and well-functioning board
- Opportunities to learn new skills and experiences to contribute to your own personal development

## Duties

Any individual acting as a trustee for Upbeat Communities would be required to carry out the following:

- Promote the vision, mission and values of the charity
- Ensure Upbeat Communities and its representatives function within all legal and regulatory requirements applicable, and in line with its constitution, continually striving for best practice in governance
- Determine the overall direction and development of Upbeat Communities through good governance and clear strategic planning
- Approve operational strategies and policies, and monitor and evaluate their implementation
- Oversee Upbeat Communities' financial plans and budgets and monitor and evaluate progress
- Review and approve the charity's financial statements
- Ensure that key risks are being identified, monitored and controlled effectively
- Provide support and challenge to Upbeat Communities' Chief Executive in the exercise of their delegated authority and affairs
- Contribute to regular reviews of Upbeat Communities' own governance.
- Attend Board meetings, and be adequately prepared to contribute to discussions.
- Use independent judgment, acting legally and in good faith to promote and protect the charity's interests, avoiding any personal conflict of interests
- Take appropriate professional advice in all matters where there may be a material risk to the charity
- Maintain confidentiality about all aspects of the trustee's business



## Finance specific duties

- Lead on the strategic financial management of the charity at board level
- Liaise with our outsourced finance team (including our Finance Director)
- Chair the finance sub-committee (which meets 6 times per year ahead of every board meeting)
- Maintain a clear grasp of the charity's financial position and ensure full and timely financial transparency and information disclosure to the board
- Support the board of trustees in financial decision making processes
- Review and approve annual budgets
- Advise on banking and investments
- Take an active role in the financial audit process
- Contribute to the financial management of our trading subsidiary (Upbeat Enterprises Limited)

## Person Specification

Skills and experience are very important to us, but character and values are what we believe makes for a good trustee. We are looking for people to join our board who:

- Are committed to see asylum seekers and refugees thrive
- Show compassion towards those forcibly displaced and needing to rebuild their lives in the UK
- Are committed to Upbeat Communities' ethos, vision, mission and values
- Believe in empowerment and seeing individuals supported to achieve their self-determined goals and aspirations
- Recognise the role charities and social enterprises play in bringing about positive change in local communities
- Value integrity and honesty and working to the highest standards
- Able to work well in a team
- Have strong interpersonal and communication skills
- Are willing to give their time and skills in order to see the charity develop
- Will commit to attending trustee meetings and ensure they are prepared for every meeting
- Can think strategically
- Have good, independent judgement
- Willing to learn, accept and understand the legal duties and responsibilities of being a trustee
- Have an understanding of, or a willingness to understand, the strategic, policy and political environments that affect and influence our work

## Finance specific experience/skills

- Qualified accountant or significant strategic finance experience, with demonstrated commercial awareness and knowledge
- Proven ability to communicate and explain financial information to members of the Board and other non-finance stakeholders
- Experience of working with auditors
- Understanding and experience of charity fundraising and finance practices, including SORP (desirable)

## Equality, Diversity & Inclusion

Upbeat Communities is a Christian ethos charity, meaning we have been founded on Christian values (initially starting out of a church). We aim to keep these values at the heart of our work, however we are not a faith-biased charity, and we do not promote religion; we support asylum seekers and refugees from all faiths or none and our staff team and volunteers are made up of people from different faiths. We are looking for trustees who can support our ethos and values but do not expect all applicants to be from the Christian faith.

We are keen to ensure our board is diverse, therefore we welcome applications from candidates from all backgrounds. Traditionally the following groups are underrepresented on boards, therefore we encourage applications from the following groups:

- Younger people including those under 25 years of age
- Women
- People of Colour
- Those with disabilities
- Those without formal qualifications
- Those with lived experience of the asylum/ refugee resettlement/ immigration system

# TERMS OF APPOINTMENT

## Remuneration

All Trustee roles are voluntary and unpaid although expenses incurred in fulfilling your duties will be reimbursed, including any travel costs.

## Duration

Trustees are currently appointed for a 3 year term, but can re-stand after this period.

## Schedule of meetings

Currently trustee meetings are held on a Monday evening (7.30-9.30pm) and are scheduled for January, March, May, July, September and November 2024.

## Finance sub-committee meetings

Currently finance sub-committee meetings are usually held in the two weeks prior to every board meeting.

## How to apply

- The first (optional) stage is a conversation with our Chief Executive, Andrew, to discuss the role further and ask any questions. To schedule a call, drop him an email at [andrew@upbeatcommunities.org](mailto:andrew@upbeatcommunities.org)
- We expect every applicant to complete a short online application form via our website and also upload an up-to-date CV – please visit [www.upbeatcommunities.org/trustees](http://www.upbeatcommunities.org/trustees) to complete your application
- We would then invite suitable candidates for a short online interview to delve deeper into each individual's skills/experiences as well as gaining an insight into how they would fit within the ethos and culture of Upbeat Communities
- Should a candidate be identified as a suitable board member following interview, they would then be invited to observe a board meeting, followed by an induction process (which would end with a formal offer)

*"Upbeat provides the perfect opportunity to bring my skills to bear to improve life outcomes for those displaced through no fault of their own. I can channel my energies to working effectively as part of a great team of talented and caring individuals. It's a privilege to give back in this way."*

- Dave, trustee

# ADDITIONAL INFORMATION ABOUT UPBEAT COMMUNITIES

## Current work

Upbeat Communities works across the East Midlands supporting the welcome and integration of asylum seekers and refugees. We currently support over a thousand people a year through a range of projects and service provision.

## Asylum seeker support

Most of our support for asylum seekers happens in Derby, from our Integration Hub. We have also developed a Satellite Hub in Long Eaton. This support includes:



daily English classes



free lunches



social activities and trips



volunteering opportunities



cultural orientation sessions



peer support groups

1:1

one to one advice and guidance



befriending

## Refugee support

We are increasingly providing support to asylum seekers who have been granted refugee status and require support to move on with their lives. This includes:

- group sessions covering benefits & budgeting, health, housing and employment
- one to one support with applications, bidding for housing, registering for utilities, and employment advice



## Children & young people

We run Upbeat Kids, our holiday activities for asylum seeker and refugee children (primary age) offering a safe space for them to play, learn and build community. We will also be piloting an Upbeat Youth project in 2024 to support older children and young people.



## Refugee resettlement

We are commissioned to provide integration support for refugees arriving in Derbyshire and Lincolnshire through the government's resettlement schemes. This involves advice and support to families around housing, schooling, health, benefits, volunteering and employment.

## Hosting



We run a hosting scheme for destitute asylum seekers and refugees, who have been made homeless and have no other options for accommodation. Volunteer hosts provide a room in their home on a short term period support guests as they decide their next steps. We also support Derbyshire County Council with Homes For Ukraine, providing rematching support for Ukrainian guests who need to find new host placements.

*"It has been a pleasure being a trustee of Upbeat Communities over the last few years. I have watched the charity grow, both in the amount of people it offers help to, but also in the breadth of different types of help it gives. The rewarding part of being a trustee is knowing that the decisions we have made in our meetings have ultimately shaped the growth of the charity."*

*- Tim, trustee*

## Social enterprises

We run two social enterprises, that both meet our charitable objectives whilst also generating income for the charity.

Derby Language School offers language learning for private students as well as corporate and statutory customers including English, Spanish, French, Arabic and German. We also offer some interpreting services through this business to support our resettlement work. Visit [www.derbylanguageschool.com](http://www.derbylanguageschool.com) for more information.



Upbeat Clean is our commercial cleaning company, employing refugees and survivors of modern-day slavery and providing life giving work that pays the real living wage and offers decent working conditions. We now have over 30 clients across Derby who partner with us to change lives. Visit [www.upbeatclean.co.uk](http://www.upbeatclean.co.uk) for more information.



# CAMPAIGNING & INFLUENCING

Upbeat Communities has a key role in the refugee sector in the East Midlands, supporting and encouraging the development of initiatives and campaigning around the rights of those seeking sanctuary. Our Chief Executive is chair of the Derby City of Sanctuary network and sits on the Derby and Derbyshire Resettlement Integration and Cohesion Board. We play a lead role in organising Refugee Week activities in Derby and also support work across Lincolnshire including the coordination of the voluntary sector response to the Homes for Ukraine scheme.



*“I love being able to use my professional skills and experience to bring about positive change for refugees through being a trustee. My beliefs and values align with the work of Upbeat Communities, and it provides a great opportunity to contribute to the charity’s development.”*

*- Lesley, trustee*

# OUR IMPACT


In our last financial year (2022-23) we made the following impact:

We provided

65 

Welcome Box visits to families and individuals arriving in Derby.

A total of

161   

women engaged with our weekly peer support sessions engaging in a range of activities including arts, music, cookery, and therapeutic sessions.

We ran a total of

425  English classes,

providing a total of 655 hours of learning for

546 individuals.

We supported

623

individuals through our Integration Hub, from 53 different nations.

We had

248 

attendees to our Upbeat Kids provision. 

Across both Host Derby and our rematching work with Homes for Ukraine, we facilitated

21 placements, supporting 31 individuals with

2,444 nights of accommodation.

We supported approx.

250-300



Afghans who were accommodated in three Bridging Hotels across Derbyshire and Lincolnshire whilst they awaited permanent settlement elsewhere.

We resettled 10 new families and supported a total of

24

across Derbyshire and Lincolnshire through the various resettlement schemes.



This was the impact of our social enterprises in the same period:

**Derby Language School** delivered an average of 500 hours of teaching and interpreting each month, totalling over **6,000** hours of provision across the whole year.

**Upbeat Clean** started the year providing 380 hours of cleaning per month for 14 commercial customers, and grew to **711** hours for by March 2023. During the year we employed more than 20 people.



# STRATEGIC OBJECTIVES

We are currently working towards achieving our 3-year Strategy (2022-2025) with the following strategic objectives:

1

Expand our range of services to effectively meet the diverse needs of asylum seekers and refugees, enabling them to thrive (helping them to build community, develop their skills, improve their wellbeing, and create opportunities for empowerment)

1.1 Being increasingly influenced and led by people accessing our project provision and those with lived experience of the UK immigration system

1.2 Identifying barriers to, and opportunities for, integration for those granted refugee status and areas where there is lack of support within the East Midlands region

1.3 Creating a space in Derby where those seeking sanctuary in the city can find belonging and can become active members of the community

Be recognised as an excellent place to work and volunteer, through a well-defined culture, ethos and values (supported by high quality leadership and management processes, and clear communication)

2

2.1 Clearly defining our culture, ethos and values in order to inform our recruitment and operating practices, ensuring we recruit and maintain a diverse and inclusive staff and volunteer team, which is aligned to the vision and mission of the charity

2.2 Improving our internal and external communications, our leadership and management practices and our operating systems and processes to ensure our strategic vision and mission is realised

2.3 Being recognised locally, regionally and nationally as an excellent place to work and for the impact of the work we carry out

# 3

Increase our financial sustainability, enabling the organisation to strengthen and grow its impact

3.1 Increasing our income from grant funding to ensure funding is in place for current projects as well as having the resources to develop new projects

3.2 Identifying new contract opportunities within the region

3.3 Growing our unrestricted income from a range of sources including individual donors, churches and corporate partners

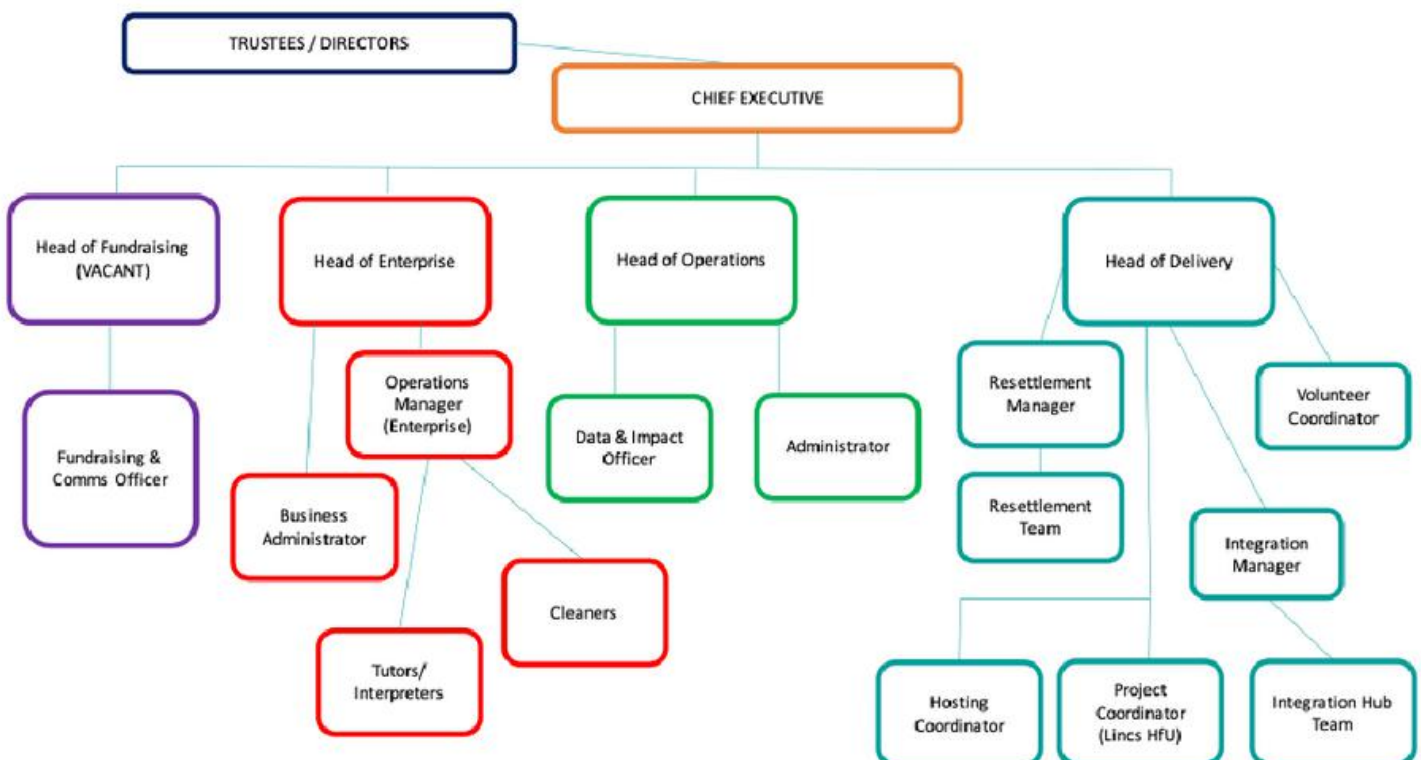
3.4. Developing our social enterprises to ensure both sustainability and increased income

## ORGANISATIONAL STRUCTURE

We are a charity (1162856) and a company limited by guarantee (05648977 ). We have also established a trading subsidiary called Upbeat Enterprises Limited (14098477 ), which is where our cleaning company, Upbeat Clean, sits.

### Organogram

The following diagram shows the current staffing structure of the charity



We have outsourced the following areas:

- Finance (Beehive Accountants)
- Information Technology (Roundworks IT)
- Human Resources (Face2Face HR)
- Fundraising (Money Tree Fundraising)

## Our Trustees

Our current trustees are:



**Dave Priestley (Chair):** Dave is motivated by the opportunity to make a positive difference to the disadvantaged, especially where that person has been forced to leave the place they've called home. He had a career in manufacturing before launching his own business supporting young people further their education and improve their future.



**Coco Kambala:** Being a migrant from the Democratic Republic of the Congo, Coco is inspired by the way Upbeat welcomes participants and offers them hope. He loves the way staff and volunteers offer guidance during the settlement process in a way that makes participants feel truly at home.



**Helen McEvansoneya:** Helen is passionate about seeing people welcomed into community and supported as they rebuild their lives. She currently works as a mental health social worker, but before that, she spent many years living and working in Russia.



**Tim Ringer:** Tim is driven by the inspirational stories of people who have had to give up everything. He is inspired by Upbeat's part in rebuilding the lives of participants and giving them a positive future. He currently works for Nottinghamshire Police.



**Lesley Yeun Jing So:** Lesley is inspired by the way Upbeat and its amazing team work tirelessly to help those who have been marginalised in society. She worked for Rolls-Royce for over a decade, before starting up a Kombucha business in Derby, with the vision of hiring and training refugees.

# HOW WE ARE FUNDED

Upbeat Communities has a diverse range of income. During 2022-23 we received the following:

Income Type	Amount	Income Percentage
Local Government Contracts & Grants	£357,341	43.4%
Grants (Trusts & Foundations)	£108,377	13.2%
Donations	£69,959	8.4%
Charitable Activities (Earned Income)	£284,821	34.6%
Other	£3,444	0.4%
Total	£823,942	100%

*"I enjoy being part of a group that makes a difference in the lives of people arriving in the UK, helping them make friendships and rebuild their lives. It's an honour to serve in this way."*

- Helen, trustee

# CASE STUDY

## Aisha's story



Aisha, her husband and her two children were welcomed and supported by Upbeat Communities when they had to seek refuge in the UK. Every person who comes through the doors at Upbeat has a unique set of challenges. This family didn't need a high level of support in language learning, but they desperately needed community, guidance, and a sense of belonging. Through Upbeat Women, Upbeat Kids and Community Meals, the family became part of life at Upbeat and began volunteering to support others.

“My name is Aisha, I'm originally from Turkey, but I came to the UK from Kenya. I was working in Kenya as an administrator and a teacher for the past 10 years. Before coming to the United Kingdom, my life was kind of settled up, and I had work to go [to]. Things were fine, actually. But, unfortunately due to lots of problems in the home country, we had to travel to the United Kingdom and seek for asylum. Before moving to Derby, we stayed in a hotel for six and a half months. In the first week in Derby we [were] placed in a house and an Upbeat volunteer visited us, and he listened to our story, he told us about Derby, he told us about Upbeat Communities. And we felt like, Okay, now we can make friends here and it's a nice start.

Then, I met Maddie [Upbeat Staff], she invited me to the Upbeat Women's group. It was so nice to feel like you are invited to a place whereby you can meet with people like you. So, it started with joining the women's programme weekly, but then I started making friends. That is the best thing.

When you first land in a country, in this situation, it is so hard. Because, one week ago or one month ago you are a normal person, you have a job, you have everything that you may have. But, suddenly, everything goes upside-down. And you are in a country, and you cannot mention about your skills, you cannot work, you cannot have friends so easily because you feel different. You feel foreign.

But Upbeat makes you feel like you belong to this place now, and you are okay. Whatever has happened to you, it's okay. It can happen to anybody. And they welcome you in a way that they don't look at your religion, they don't look at your skin colour, they don't look at your background, education, whatever. They just accept you because you are an important human being.

My favourite thing in Upbeat is knowing that there is a group of people who are ready to listen to me whenever I have a problem. We feel comfortable here, everybody is so welcoming. That makes us feel happy and forget, actually, our problems, what is happening, forget for some moment and feel normal. That is so important.”