Organisation: Rooted Finance
Role Title: Board Apprentice (Non-Voting Board Observer & Trainee)
Tenure: 12 Months
Educational Bursary: £2,000 per annum (non-taxable educational grant, plus evidenced out-of-pocket expenses)
Time Commitment: Approximately 4–6 hours per month (includes board meetings, mentor check-ins, and study/prep time)
Reporting / Mentor Support: Assigned Senior Trustee / Mentor & Chair of the Board
Location: Hybrid (Remote meetings with occasional in-person board meetings in London)

About Rooted Finance

Rooted Finance is an FCA-authorised debt advice charity dedicated to providing free, high-quality, impartial debt advice and financial capability support. We work to relieve the distress and vulnerability associated with problem debt, empower our clients, and tackle systemic financial exclusion.

Purpose of the Role

Rooted Finance is committed to breaking down barriers to charity leadership and fostering diversity within non-profit governance.

The **Board Apprentice** programme is a training opportunity designed to provide emerging leaders—particularly younger individuals or those from backgrounds underrepresented at board level—with practical insight, exposure, and confidence in charity governance.

This is an **educational and developmental role**. The Board Apprentice will participate in board discussions as a non-voting observer and complete a structured learning curriculum, without carrying legal, financial, or statutory Trustee liabilities.

What You Will Receive

- **Dedicated 1:1 Mentorship:** You will be paired with an experienced member of our Board of Trustees who will provide guidance, debrief board discussions, and support your leadership journey.
- **Formal Learning Plan:** A tailored governance curriculum covering the charity governance code, financial oversight, strategic risk, and regulatory standards (including our FCA-regulated environment).
- **Hands-on Boardroom Exposure:** Full access to board packs, committee discussions, and strategic workshops.
- **Educational Bursary:** A **£2,000 annual bursary** awarded as an educational training grant to support your learning, time, and development.

- **Full Out-of-Pocket Expense Coverage:** Travel, childcare, access needs, and subsistence costs related to the role are fully reimbursed.

  Note on Bursary & Benefits: The bursary is intended solely as an educational grant to facilitate learning and personal development. Under standard UK tax and welfare definitions, bona fide educational bursaries for unpaid training positions are not classed as employment earnings. We are happy to provide formal documentation confirming the nature of this educational training programme for your tax or benefit assessment records where needed.

Key Responsibilities & Activities

1. Board Engagement & Observation

- Prepare for, attend, and observe quarterly Board meetings and selected sub-committee meetings.
- Review board packs, strategic reports, and financial summaries in advance.
- Contribute lived experience, perspectives, and constructive input to board discussions during non-statutory debates.

2. Learning & Governance Development

- Complete your agreed **Individual Governance Learning Plan**, including reading materials, webinar sessions, or external governance modules (e.g., introductory charity governance resources).
- Attend regular pre- and post-board mentoring sessions to review board papers, unpack boardroom dynamics, and reflect on governance decisions.
- Participate in annual board strategy away-days and team training sessions.

3. Sector & Community Insight

- Act as a sounding board, bringing fresh perspectives on community needs, financial resilience, and the lived reality of those navigating debt and financial pressures.
- Provide feedback on how Rooted Finance can remain accessible, inclusive, and responsive to the communities we serve.

Legal Status & Accountability

- **Not a Statutory Trustee:** You will not be registered as a Trustee with the Charity Commission or as a Director with Companies House.
- **No Fiduciary or Financial Liability:** You do not hold statutory voting powers or legal responsibility for the management and governance of the charity.
- **Confidentiality & Conduct:** You will be required to adhere to the Charity's Code of Conduct, Confidentiality Agreement, and Conflict of Interest Policy to ensure board deliberations remain secure and trusted.

Person Specification

We are looking for potential, passion, and fresh perspectives rather than prior board or professional qualifications.

Experience & Background

- **No prior board or trustee experience required.** This role is explicitly designed for individuals seeking their first board-level exposure.
- A strong personal or professional interest in financial inclusion, social justice, debt advice, or community empowerment.
- We actively encourage applications from young people, individuals with lived experience of financial hardship or problem debt, and ethnic minority backgrounds who are traditionally underrepresented in trustee spaces.

Skills & Attributes

- **Curiosity & Willingness to Learn:** Eagerness to understand how a charity operates, from finances to regulatory compliance.
- **Constructive Communication:** Ability to articulate ideas, ask questions, and share insights respectfully within a team setting.
- **Commitment:** Reliability to prepare for and attend scheduled board and mentoring meetings.
- **Integrity:** A commitment to Rooted Finance's mission, values, and the confidentiality required in a regulatory environment.

How to Apply

To apply, please submit:

1. A short **Statement of Interest** (maximum 1 page or a 3-minute video/audio note) explaining why you are interested in charity governance and what you hope to learn from the Board Apprentice role at Rooted Finance.
2. A brief summary of your background, community involvement, or CV (where available).

Rooted Finance is committed to accessibility. If you require adjustments or alternative application formats, please let us know.