

# Recruitment Pack for Trustees

SEPTEMBER 2025



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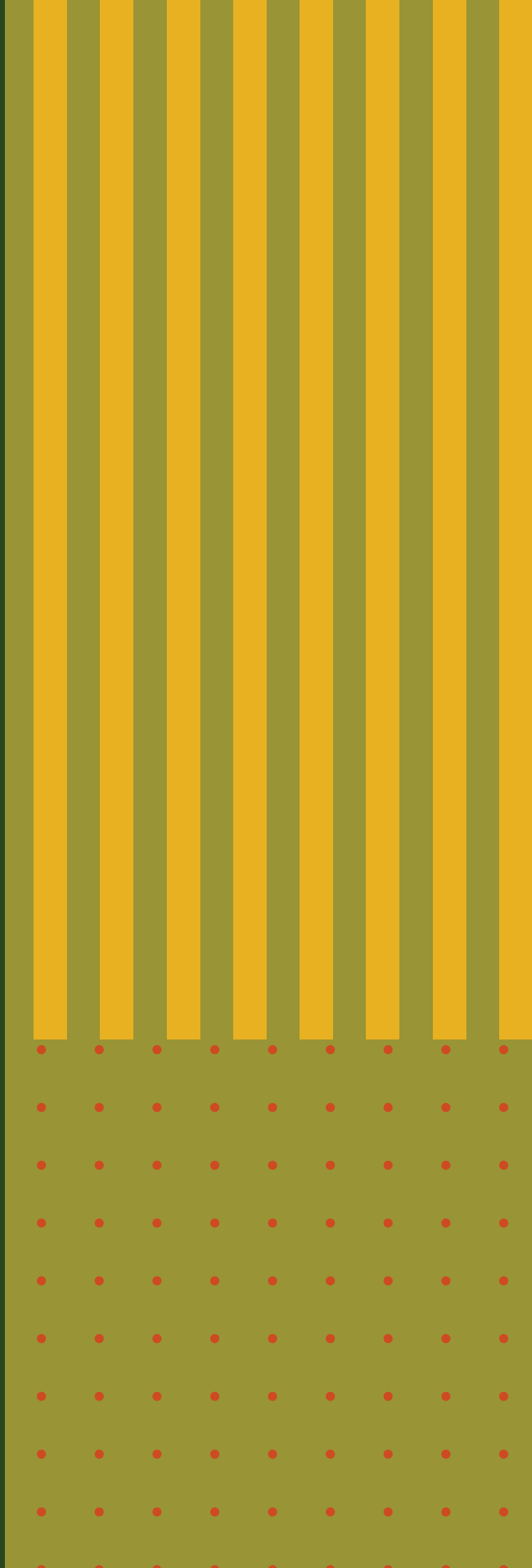
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# Welcome Letter from the Chair

Dear Potential Trustee,

**Thank you for your interest in becoming a Trustee of Plunkett UK.**

At Plunkett, we are committed to our vision of building resilient, thriving, and inclusive rural communities — a mission we deliver by supporting community-owned businesses across the UK. **We are proud to be the only national organisation solely dedicated to this purpose, with a legacy that spans over 100 years.**

We are now approaching the end of our current strategic period, during which we've seen significant growth in the size, impact, and reach of the community business sector. Looking ahead, **we're preparing to develop a new strategy** that responds to the evolving challenges facing rural communities, while embracing the unique opportunities that community businesses can unlock.

**Our Trustees play a central role in shaping this future — guiding strategy, ensuring strong governance, and championing our values.**

As part of our regular board refreshment cycle, we are now looking to appoint up to two new Trustees. We are particularly keen to hear from individuals with diverse experiences and perspectives, **especially those with a strong commercial background**. Insight into 'place-making' and the potential role of Plunkett within this space would be especially welcome. We are also interested in applicants who can help us better understand the potential of AI and enhance our digital capacity.





Previous board experience is not essential — what matters most is your energy, commitment, and passion for supporting Plunkett’s rural mission and the communities we serve.

Joining our Board means becoming part of a dedicated team that believes in collective purpose and is committed to making a real and lasting difference. Trusteeship is both a responsibility and a privilege — offering the opportunity to influence our future and learn alongside passionate and experienced peers.

If this opportunity resonates with you, we would love to hear from you. Please review the role description and don’t hesitate to get in touch with any questions or to arrange an informal conversation.

Finally, we warmly welcome applications from individuals of all backgrounds — including those with lived experience of rural marginalisation — and are committed to building a more inclusive and representative board.

With best wishes

Alison Jeffers  
Chair Elect, Plunkett UK





# About Plunkett UK



**We are a national charity supporting people in rural areas to set up and run successful businesses in community ownership. We do this to achieve our UK-wide vision for resilient, thriving and inclusive rural communities.**

Community-owned businesses are owned and controlled by community members, who each have **an equal and democratic say** in how the business is run. They can be any type of business ranging from village shops, pubs and cafes, through to woodlands, fisheries and farms.

Plunkett UK has promoted the community ownership model for over 100 years because of its track record for delivering **better businesses for people, communities, the economy, and the environment.**

We help community businesses to:

- Provide a **wide range of services and amenities** that communities value and need – enabling people to live independently, particularly in areas of market failure
- Stimulate the rural economy through **localised supply chains**
- Create access to **employment and training and volunteering opportunities**– often supporting people who are excluded from the labour market
- Tackle climate change through **environmentally responsible behaviours**
- Promote **equity, diversity and inclusion** by creating safe and welcoming spaces for all

**Once trading, community-owned businesses rarely fail, having a five-year survival rate of 99% and over twenty-year survival rate of 94%.**

Plunkett is the only organisation dedicated to supporting rural community-owned businesses UK-wide. At a practical level, our dedicated and expert team:

- **Raise awareness** of the community business model through proactive press, media and campaigns
- **Provide practical support** to help new community businesses set up and existing ones to thrive via specialist business advice, training, webinars and toolkits.
- **Create a supportive environment** for community businesses to operate, via membership, networking, research and advocating with government, think tanks and funders.

We operate an accessible and inclusive service for community-owned businesses which is free of charge. No eligible communities are ever turned away. We achieve this by working collaboratively with a wide range of partners from across the community, charity and corporate sectors who share our values.



# Our Five-Year Strategy



**Our current five-year strategy runs until 2026 and will be measured against the following:**



**Growing the rural community business sector:** We aim to grow the sector by at least +20%, helping existing businesses to thrive while also supporting new ones to open.



**Extending our geographic reach:** We'll increase awareness of the community business model across the UK, and the support we offer them. We'll also target rural areas where community businesses are most under represented, and remove any barriers that limit the potential for community businesses to thrive.



**Increasing the impact of Plunkett and our Members:** Through our community business service, our partnerships and advocacy work, we'll help community businesses to deliver better social, economic and environmental benefits for their communities and identify opportunities for greater impact.



**Building a Movement:** We will encourage community businesses and all who support them to become a member of Plunkett and to feed into our research, policy and communications to ensure we influence a better environment for rural community businesses to thrive.



**Securing Plunkett UK's financial stability:** We'll continue to diversify our income sources, with a goal of reaching break-even across the five-year strategy period. This will ensure we're able to continue helping the wider rural community business movement to grow and thrive. All financial surpluses will be reinvested in our mission.

Underpinning the strategy, is a commitment to work with others, and play a greater leadership role in societal issues such as climate change, mental health, and approaches to equity, diversity and inclusion.





# Governance and Finance



**Plunkett UK is the operating name of Plunkett Foundation a charity registered in England and Wales and in Scotland and is registered as a company limited by guarantee.**

The Board meets formally up to five times a year, one of which takes place over two days. The AGM takes place in addition to the formal board meetings, and is normally held in September. We currently operate two subcommittees – ‘Audit and Risk’ and ‘Governance and Nominations’ – and occasionally create time limited working groups. Typically, formal board meetings take place either in London or Oxfordshire and meetings of the subcommittees and working groups meet virtually.

Plunkett has an typical annual turnover in the region of £1.3m. Our current strategy has successfully initiated a diversification of our income streams to include community fundraising, corporate partnerships, and development of earned income through training, membership and consultancy. This reduces our dependency of grants income, although we still anticipate it representing an important element of our income generation throughout the next strategy period.

Plunkett has unrestricted reserves of approximately £1m and is in a healthy financial position.



# Role description

## Statutory duties

The Board of Trustees is responsible for the overall governance and strategic direction of the organisation, developing the organisation's aims, objectives and goals in accordance with the governing documents, legal and regulatory requirements. The Board has adopted the current Charity Commission Code of Governance and this guides its activities.

The Board has a number of legal and regulatory responsibilities. Briefly, these include:

- Ensuring the charity is carrying out its purposes for the public benefit
- Complying with the charity's governing document and the law
- Acting in the charity's best interests
- Managing the charity's resources responsibly
- Acting with reasonable care and skill
- Ensuring the charity is accountable to its stakeholders, including the Charity Commission, Plunkett members, funders and other beneficiaries.

## As a Trustee

You would be expected to:

- Support and espouse the Plunkett ethos and values.
- Be committed to the well-being of the organisation and its stakeholders.
- Promote the organisation externally, where possible and as appropriate.
- Abide by the Governance Code and all relevant legislation and regulations.
- Understand and undertake the legal duties, responsibilities and liabilities of trusteeship.
- Be able and willing to devote the necessary time and effort, including attending board meetings, AGM, etc.
- Work as part of a team in a constructive, collective and collaborative manner.
- Bring your skills/attributes to bear in support of the Chair and other Trustees, senior management and the organisation.
- Exercise independent judgement.
- Support senior management at strategic and overarching level.
- Be willing to be open and challenge other Trustees and (senior) management in a constructive way.
- Be willing to be challenged.
- Be open to others' ideas.
- Display conduct that is fitting to the role and shows respect to others.
- Meet agreed performance standards. Trustees would be expected to step down if they consistently failed to meet those standards.
- Attend board meetings. Missing more than three meetings without good reason in any one year will lead to automatic dismissal.
- Report any actual or potential conflicts of interest.
- Demonstrate the seven principles of public life: selflessness, integrity, objectivity, accountability, openness, honesty and leadership.





# Role description

## Why become a Trustee?

Becoming a Trustee gives you the opportunity to:

- Work closely with a passionate team of people
- Learn new skills in a leadership role
- Challenge yourself, by applying your existing skills in a new environment
- Gain valuable experience such as setting a strategic vision, influencing and negotiation, and managing risk. If you already have significant experience in these areas, it can be stimulating to use it in a different and potentially challenging context
- Develop new networks
- Play a fundamental role in the strategic development of the organisation

## How you will be supported in the role

A full induction process will be conducted upon your appointment, including one to one meetings with fellow Trustees, the Chair, and the senior management team. Training will be provided as necessary.

We are open to applications from people without previous board experience and support would be provided to first time Trustees including; training on charity governance, coaching, mentoring and buddying up with more experienced Trustees.

## Person Specification

We expect all Trustees to have the following attributes:

- Good understanding of the community business model and the impact they have
- Genuine passion and belief in the work of Plunkett
- Willingness to devote the necessary time and effort
- Ability to think strategically
- Good, independent judgement
- Ability to think creatively
- Willingness to speak their mind
- Understanding and acceptance of the legal duties, responsibilities and liabilities of trusteeship
- Ability to work effectively as a member of a team
- Lived experiences consistent with Plunkett's vision, mission and values.

Plunkett adopts a positive approach to **Equity, Diversity and Inclusion**. We have identified weaknesses in terms of racial diversity and geographical location on the Board. As such we welcome applications that address these imbalances.

The role is unremunerated. We realise that being a Trustee can incur financial expenses, such as travel and accommodation, and we are committed to ensuring that these costs are not a barrier to your application or carrying out the Trustee role.



# Application Process

## How to apply

If you are interested in becoming a Trustee of Plunkett, please send a copy of your CV, together with a short letter of interest (one side A4) outlining:

- Why you fulfil the person specification of Plunkett UK
- The nature of your experience in the community business or wider community sector
- The nature of or experience and understanding of the needs, issues and opportunities of rural communities
- What you think your major contributions to Plunkett would be
- A declaration that you are not disqualified from becoming a Trustee
- A list of any Directorships or Trusteeships that you currently hold.
- Full contact details (name, job title, organisation, phone and email) for two referees. Please note we will not take up references without your prior permission.

Please apply by email to Plunkett's Head of Compliance and Internal Operations [kathryn.morrison@plunkett.co.uk](mailto:kathryn.morrison@plunkett.co.uk) with the title "Trustee Application – Confidential" in the email header.

Your application will be acknowledged and treated with strictest confidence. Plunkett recognises that your privacy is important, and we take our responsibility for the safety of personal data seriously. Should you require a copy of our privacy policy please contact Kathryn Morrison.

Shortlisted applicants will be invited to discuss their application with the Nominations Panel.

## Recruitment timetable

- Deadline for applications: 5pm, Friday 26 September 2025
- Interviews will take place during w/c 13 October 2025
- Notification of successful applications by Tuesday 21 October 2025
- Subject to their availability there is the potential for successful applicants to attend, as a guest, a strategy session and Board meeting on Wednesday 5/Thursday 6 November 2025
- Successful applicants would be co-opted at the December Board Meeting and remain as co-opted Trustees until the next AGM
- Subject to the agreement of the Board, successful applicants would be put forward for formal election at the AGM in 2026

## Queries

If you wish to arrange an informal discussion with Alison Jeffers, Chair Elect, or James Alcock, Chief Executive, about this role; or, if you have any queries please contact [kathryn.morrison@plunkett.co.uk](mailto:kathryn.morrison@plunkett.co.uk)



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