

TRUSTEE ROLE DESCRIPTION

As a Trustee, with your co-Trustees you must make sure that the charity is carrying out the purposes for which it is set up, and no other purpose. Trustees may be known by other titles, such as:

- Directors
- Board members
- Governors
- Committee members

Whatever they are called, Trustees are the people who lead the charity and decide how it is run. Below is a detailed description of what duties and responsibilities are expected of a Trustee.

Overall

- Ensure you understand the charity's purposes as set out in its governing document.
- Plan what your charity will do, and what you want it to achieve.
- Be able to explain how all of the charity's activities are intended to further or support its purposes.
- Understand how the charity benefits the public by carrying out its purposes.
- Ensure that you do not receive any benefit from the charity unless it's properly authorised and is clearly in the charity's interests; this also includes anyone who is financially connected to you, such as a partner, dependent child or business partner.

Specifically

- Ensure that the organisation complies with its governing document, charity law, and any other relevant legislation or regulations.
- Ensure that the organisation pursues its objectives as defined in its governing document.
- Ensure that the organisation applies its resources exclusively to its objectives, i.e. the organisation must not spend money on activities which are not included in its own objectives, no matter how worthwhile or charitable those activities are.
- Contribute actively to the board of trustees' role in giving firm strategic direction to the organisation, setting overall policy, defining goals, setting targets and evaluating performance against agreed targets.
- Safeguard the good name and values of the organisation.
- Represent the charity at functions and meetings as appropriate.
- Attend meetings including AGM's, and to read papers in advance of meetings.
- Declare any conflict of interest while carrying out the duties of a trustee.
- Be collectively responsible for the actions of the organisation and other trustees.

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- Ensure the effective and efficient administration of the charity.
- Make sure the organisation is properly insured against all reasonable liabilities.
- Participate in other tasks as may arise from time to time, such as interviewing new staff or helping with fundraising.
- Finally, each Trustee should use any specific knowledge or experience they have to help the board of trustees reach sound decisions.

Qualities

- Integrity.
- Commitment to the organisation and its objectives.
- Understanding/acceptance of the legal duties, responsibilities & liabilities of trusteeship.
- Willingness to devote the necessary time and effort to the duties required as a Trustee.
- Good, independent judgment.
- Strategic vision.
- Ability to think creatively.
- Willingness to speak their mind.
- Ability to work effectively as a member of a team.

Useful Skills and Experience

- Financial management.
- Fundraising.
- Knowledge of or experience in legal matters.
- Public relations.
- Campaigning.
- Computers and information technology.

Eligibility

You must not act as a trustee if you are disqualified under the Charities Act, including if you:

- have an unspent conviction for an offence involving dishonesty or deception (e.g. fraud)
- are bankrupt or have entered into a formal arrangement (e.g. an individual voluntary arrangement) with a creditor
- have been removed as a company director or charity trustee because of wrongdoing.