

trustees

Who are trustees?

Trustees are the people who serve on the governing body of a charity. They may be known as trustees, directors, board members, governors or committee members.



There are very few restrictions on who can be a trustee. Trustees come from all walks of life, from professionals to people with personal skills. There are around 800,000 trustee positions in the UK. 48% of trustees are female. 66% of trustees are over 50 years of age but young people can make great trustees and should be encouraged to join boards.

Why might you become a trustee?



There are four good reasons for being a trustee. Firstly, you have a lot to offer a charity. Secondly, you will develop transferable skills, improve your CV and broaden your experience. Thirdly, you will meet interesting new people and it could open doors to all sorts of other networks and opportunities. Finally, you have the chance to shape, support and contribute your ideas and knowledge to a meaningful organisation.

How can you contribute to a charity board?



Around 50% of all charities are looking for new trustees at any one time. Each charity is in need of a range of professional skills, such as law, finance, IT, HR, PR, marketing as well as life skills. You do not need to be a specialist to be valuable, if you apply fresh perspective and a bit of common sense, you'll be doing a good job.

What is the role of a trustee?

Being a trustee is like a non-executive director of a company. A trustee's role is to provide checks and balances and oversight of the organisation's performance, ethics, finances and risks.

Trustees ensure that the charity complies with charity law and that it is well-run, in good financial shape and delivering its charitable objectives to the best of its ability. Trustees support and challenge the management team on strategy and major decision-making so they can deliver the charity's activities effectively.

A trustee shouldn't interfere in the day-to-day operations but, from time to time, particularly in really small charities, you may well be more involved.

What do you need to know about charity?

To be a responsible trustee, you need to have a basic understanding of the role of charity in society. Generally, you will not be expected to have board level experience or be an expert in either the specific cause or charity law. What is vital is that you feel passionate about the mission of the charity you join.

It is helpful and rewarding to meet the people involved in the charity and where appropriate, see the charity's work first hand and meet some of the beneficiaries.



How can you prepare to become a trustee?



A lot of charities will provide new trustees with an induction and training. With or without this, it's important for you to feel comfortable with the charity's procedures and confident in your understanding of the charity's mission, its activities and achievements.

It is a good idea to request and review a copy of the charity's annual report and governing documents. It might be worthwhile asking if you can observe a trustee meeting before you officially join.

Is a trustee a voluntary role?

Unlike non-executives of a company, trustees shouldn't expect to be paid other than legitimate, agreed, out of pocket expenses. It is not forbidden to pay trustees but it requires approval from the Charity Commission and in practice it is an exception rather than the norm.



What is the role of a chairman?

The chairman has the same responsibilities as the other trustees except the chairman also acts as the representative of the board and is responsible for chairing the trustee meetings. It is good practice to get to know the chairman and keep him or her informed of your ideas and concerns.

How often do trustees generally meet?

Depending on the size and complexity of a charity, trustees will meet on average between 4–8 times per year. A well chaired meeting, in normal circumstances, should not last longer than two hours. Most trustee boards have a fixed term of membership (e.g. 3 years) with a limit on how many terms you can serve as a trustee.

What is expected of trustees between meetings?

Prepare for trustee meetings by reading the papers carefully and making notes of issues that you do not understand or where you have comments. If you have strong views against any of the information provided, it is best to communicate your views to the CEO (or equivalent) in advance.

You'll be able to contribute much more and get more out of your role if you attend the occasional event, offer introductions and connections to the charity or support the senior management with a particular project. There might be committees that are suitable for you to join where you can apply your specialist expertise or interests in an organised forum for discussion (e.g. finance committee).



What is good governance of a charity?

First and foremost, trustees need to make sure that a charity is always focused on its mission and meeting its charitable objects to the best of its ability.

Trustees have the responsibility to ensure that the charity complies with its legal, financial and ethical obligations. On a practical level, trustees need to make sure that the charity is accountable to the Charity Commission and Companies

House (if it is incorporated) and files its report and accounts on time. Good governance means having sensible internal controls and policies to govern the charity's operations (from personnel, fiscal, risk to legal matters).

Where can you learn more?

The best places to go are:

- The Charity Commission:
charity-commission.gov.uk
- National Council for Voluntary Organisations:
ncvo-vol.org.uk

Where can you find trustee opportunities?

There are a number of ways to find exciting trustee opportunities. Here are a few practical tips:

- Register with Getting on Board, Good People, TrusteeWorks, Trusteefinder, Trustees Unlimited or join The Bulldog Trust's Engaging Experience Philanthropy Network
- Getting on Board runs seminars for those considering board level volunteering and provides a bespoke service to help you find suitable trustee roles
- The Guardian, The Sunday Times, Charity Job and Third Sector advertise lots of trustee vacancies
- Do approach directly any charity you are interested in. Many will welcome you



What questions might be useful to ask at board meetings?

1. What are the charity's headline results during this period?
2. Are we making best use of resources to fulfil our mission?
3. What is the evidence that demonstrates that we are achieving our objectives?
4. Are we focusing on the right things or have we drifted into activities that are inconsistent with our core charitable aims?
5. What are the state of our finances, including expenditure and adequacy of resources?
6. How are we progressing with fundraising targets?
7. Do we need to review any contracts or major commitments?
8. Are there any areas we might require some specialist advice? (e.g. pension schemes, redundancies, property, investment management, charity law)
9. Are there issues or risks relating to the conduct of the charity generally?
10. What are the current obstacles and what is not going so well?



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