

FACTSHEET – TRUSTEE ROLES AND RESPONSIBILITIES

What are trustees?

Trustees are the governing body responsible for the governance of a charity. 'Governance' refers to the systems and processes concerned with ensuring the overall direction, effectiveness, supervision and accountability of an organisation. Trustees have overall control of the organisation and are responsible for making sure it's doing what it was set up to do. Sometimes trustees are referred to as 'board members', 'governors' or 'committee members'. If your charity is incorporated as a charitable company, usually the charity 'trustees' and the company 'directors' are the same people.

Trustees are legally responsible for the charity, its assets (money, equipment, building and other resources), decisions and actions. Trustees can delegate out operational roles and responsibilities to members of staff (if they have any) and volunteers, but ultimate authority and responsibility is shared collectively with the board of trustees. In smaller organisations without any paid staff, the trustees are likely to be the same people carrying out the day-to-day operational work. But it is important that trustees separate any operational or delivery work they do from their governance role as a trustee.

Who can be a trustee?

You must be 16 years old to be a trustee of a charity that is a company or a charitable incorporated organisation (CIO), or at least 18 to be a trustee of any other sort of charity. You cannot act as a trustee if you are disqualified unless authorised to do so by a waiver from the Charity Commission. Reasons for disqualification include being bankrupt or having an individual voluntary arrangement (IVA), having unspent convictions for offences including dishonesty or deception and being on the sex offenders' register.

What do trustees do?

Trustees are the people who lead the charity and decide how it is run, making decisions that will impact on people's lives through the charity's work. In the majority of cases being a trustee is a voluntary role and you are not paid except to cover out-of-pocket expenses. Trustees use and build on their skills and experience to ensure good governance of their charities, helping the charity achieve its aims.

The Charity Commission breaks down the 6 trustee duties as follows:

1. Ensuring your charity is carrying out its purposes for the public benefit
2. Complying with your charity's governing document and the law
3. Acting in your charity's best interests
4. Managing your charity's resources responsibly
5. Acting with reasonable care and skill
6. Ensuring your charity is accountable



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Trustees should meet formally at least every 3 months and keep clear written records ('minutes') of discussions and decisions made at meetings. The following is a list of some of the key things all trustees should be involved in doing:

- Set the charity's mission, strategy and ensure policies and procedures are put in place and kept up to date
- Promote the charity – as an ambassador and champion of the organisation's work
- Ensure the charity is meeting the needs of the people it aims to support (the 'beneficiaries')
- Read, be familiar with and follow the charity's governing document ('constitution')
- Ensure the charity has enough income to deliver its purpose and activities
- Identify and manage risks
- Use resources responsibly to further the aims of the charity
- Be pro-active in getting professional advice when needed
- Ensure your legal accounting and reporting requirements are met
- Recognise and manage any conflicts of interest that arise
- Be prepared to ask questions and challenge

Further reading, resources and support

Understanding the roles and responsibilities of being a trustee is important, but equally it should not scare you away. Being a trustee can be an extremely rewarding way of supporting a charitable cause you care about, applying your skills and developing your knowledge to support a charity to thrive.

Reading and understanding your charity's governing document is essential. To further develop your knowledge and understanding of the trustee role, explore the following:

[The Essential Trustee: what you need to know, what you need to do \(Charity Commission guidance\)](#)

[The Governance Jigsaw – 6 main duties for trustees](#)

[Charity Commission's 5-minute guides for charity trustees](#)

[The Charity Governance Code](#) – a practical tool to help charities and their trustees develop high standards of governance

[NCVO - practical steps to achieve and maintain good charity governance](#)

[NCVO - carrying out a governance review](#) – practical guidance and information about different types of governance review, including a trustee skills audit template to help you identify potential skills gaps on your board

Training and support for trustees at Bury VCFA

Bury VCFA deliver regular free trustee training for charities working in Bury. If you are interested in attending an upcoming training session please contact fundinganddevelopment@buryvcfa.org.uk

For general governance queries or for trustee advice and guidance, please do get in touch.



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