The Essential Trustee
6 main duties

- Comply with your charity’s governing document and the law
- Ensure your charity is accountable
- Act in your charity’s best interests
- Ensure your charity is carrying out its purposes for the public benefit
- Manage your charity’s resources responsibly
- Act with reasonable care and skill
It’s about knowing:
• what your charity can and can’t do within its purposes
• how your charity is fulfilling its purposes and benefiting the public
• what difference your charity is really making

It’s about being:
• familiar with your governing document
• up to date with filing accounts, returns and any changes to your charity’s registration details
• aware of other laws that apply to your charity

It’s not about being:
• an expert - but you do need to take reasonable steps to find out

It’s about:
• making balanced, informed decisions
• recognising & dealing with conflicts of interest
• ensuring trustee benefits are allowed
• being prepared to question and challenge
• accepting majority decisions

It’s not about:
• preserving the charity for its own sake
• serving personal interests

It’s about:
• managing risks, protecting assets (reputation) and people
• getting the resources your charity needs
• having and following appropriate controls and procedures
• dealing with land and buildings
• responsibility for, and to, staff and volunteers

It’s about:
• using your skills and experience
• deciding when you need advice
• preparing for meetings
• getting the information you need (financial, management)
• being prepared in case something does go wrong

It’s about:
• meeting legal accounting and reporting requirements
• being able to show that your charity complies with the law and is effective
• being accountable to members and others with an interest in the charity
• ensuring that staff and volunteers are accountable to the board
• welcoming accountability as an opportunity not a burden

The Governance Jigsaw – The Essential Trustee (CC3)