



## Being a Trustee

**Are you a trustee, or perhaps thinking of becoming a trustee of a charity?  
Do you know what is involved? What are your duties and responsibilities?**

### Trustees

Charity trustees are the people who make up the governing body of a charity. Other titles they may be known by are 'trustees', 'directors', 'board members', 'governors' or 'committee members'. Trustees are responsible for the general control and management of a charity. Boards of Trustees have at least three named roles: Chair, Treasurer and Secretary. Whilst there are tasks that regularly fall to the individuals standing for each of these roles, it is important to remember that ***the Board of Trustees as a whole*** is responsible for the management and control of the charity.

### What you shouldn't delegate

If you are a new trustee, or about to become one, then being familiar with the governing document of your organisation is an excellent way to ensure you know what you should and should not do as a trustee, and the powers and limitations of your organisation. There are certain duties which trustees must not delegate and these are broadly covered by the following four key points - trustees must:

1. ensure that the charity complies with charity law, and with the requirements of the Charity Commission (the regulator of charities);
2. ensure the charity keeps within its charitable purposes and objects and keeps within its powers and restrictions, as stated in its governing document
3. comply with the requirements of other legislation and regulators which govern the activities of the charity;
4. act with integrity, and avoid misuse of charity funds or assets and any personal conflicts of interest.

### Roles and Responsibilities

**The Chair** is the person who makes sure things get done – not the person who does everything! Trustees should act collectively as a Board and even the Chair has no powers unless these are delegated to him/her (in general, trustees can only delegate where there is clear power to do so in the governing document). Good Chairing is very often the key to making meetings work; fellow Trustees can chair meetings – it doesn't always have to be the Chair person. The Chair should:

- introduce and summarise the purpose of each meeting
- introduce each agenda item and provide relevant background information
- summarise points made in discussions and encourage decision making
- allow everyone who wishes to speak to do so (time permitting)
- ensure meetings stay on track and finish on time
- make sure each agenda item is discussed and a decision is made and recorded
- prepare the agenda for meetings (with the Secretary)
- guide the group to meet its aims



**The Secretary's** job is to keep people informed so that they feel involved and are able to join in with what the group does. The Secretary's main duties include:

- taking minutes of meetings and ensuring everyone receives a copy
- informing people when and where the next meeting is
- informing the trustees about correspondence sent to and from the group
- writing and receiving letters on behalf of the group
- preparing the agenda for meetings (with the Chair) and ensuring trustees receive timely agendas and minutes
- keeping a record of membership

**The Treasurer** looks after the group's funds. The amount of work involved will vary according to the size of the group and the amount of money it receives, but the principles and duties are the same. The main duties of the Treasurer include:

- opening a bank account in the name of the charity (with two other Trustees)
- paying any bills incurred by the group
- keeping a written record of money received and money spent
- reimbursing trustee expenses and keeping petty cash
- preparing statements for Trustee meetings and the Annual General Meeting (AGM)

**Other named roles:** some groups decide to use additional named and/or deputy roles, depending on the size of the board of trustees and the organisation's activities. For example: deputy Chair, Secretary and Treasurer, Fundraising Officer, Publicity Co-ordinator. The duties of deputy roles are to support, assist, and stand in when necessary.

**Well-behaved Trustees:**

- attend meetings regularly and arrive on time
- make useful suggestions at meetings; keep comments short and to the point
- listen to others and do not interrupt
- support others, help people without taking over
- do what they say they will do

**For more detailed information, please make use of the following resources:**

**CC3 The Essential Trustee: What you need to know**

[www.charity-commission.gov.uk/publications/cc3.aspx](http://www.charity-commission.gov.uk/publications/cc3.aspx)

**Trustee Code of Conduct**

[www.manchestercommunitycentral.org/sites/manchestercommunitycentral.org/files/Code%20of%20Conduct%20for%20Trustees%20CTN%20booklet.pdf](http://www.manchestercommunitycentral.org/sites/manchestercommunitycentral.org/files/Code%20of%20Conduct%20for%20Trustees%20CTN%20booklet.pdf)

**ICSA Guidance Note Matters Reserved for the Board of Trustees (England and Wales)** [www.icsa.org.uk/assets/files/pdfs/guidance/071011.pdf](http://www.icsa.org.uk/assets/files/pdfs/guidance/071011.pdf)

**Manchester Community Central Trustee Toolkit: Essential resources and information for trustees** [www.manchestercommunitycentral.org/trustees-toolkit](http://www.manchestercommunitycentral.org/trustees-toolkit)