

## **GUIDE TO BECOMING A TRUSTEE**

A short, straightforward document from the National Council for Voluntary Organisations (NCVO), ideal for a new or prospective trustee to give an idea of the roles and responsibilities involved

### **Who is a trustee and what is a trustee board?**

A trustee is a member of a group of people - the board of trustees, management committee or governing body - who have ultimate responsibility in a charitable voluntary organisation.

- Trustees take overall legal responsibility for the charity's work
- Trustees must act in the best interests of the charity
- Trustees often delegate day to day tasks to staff and volunteers
- Trustees are usually volunteers - trustees can only be paid in exceptional circumstances. However you should not be out of pocket financially for the work you do. More on this
- Trustees are not often permanent - some trustees have an unlimited term of office but many will need to stand for re-election or take a break at least every few years.

### **What is a charity?**

Charities are set up to benefit others and not those responsible for its running, and the work of a charity falls under one or more of four main categories: the relief of poverty, the advancement of education, the advancement of religion and other purposes beneficial to the community. Most charities are registered with the Charity Commission except very small organisations or those with a special excepted or exempted status.

### **What are my responsibilities as a trustee?**

- Take the big decisions about the future
- Ensure everything is legal and safe
- Support the head of staff
- Ensure the work of the charity is carried out
- Ensure you as trustees are up to date and skilled to do your job

### **This means...**

- Working for others not yourself - Trustees have to act in the best interests of the charity - not any other interest. Your own personal interests, the views of a certain section of membership or staff or any outside interests should be left behind before you sit down at the meeting table
- Taking legal responsibility - You are ultimately responsible for what goes on, including financial responsibility and employment responsibility. Sounds scary? Don't worry! As long as you have made proper, informed decisions, followed the rules of your governing document and taken professional advice when you need to then you won't run into any serious trouble

- Giving time - trustee boards often meet quarterly or bi-monthly - You will need to be able to commit a small amount of time, probably no more than a few hours a month.
- Working together - you have joint responsibility with the other trustees - trusteeship is about working together. No matter what happens, you will always have to try to get along with your fellow trustees: this means listening to others trustees and advisors, saying what you think and accepting the majority decision.
- Keeping up to date on the facts - To do your job properly will involve finding out about the organisation - its services, staffing, future plans, what might affect its services and future funding opportunities and risks
- Making sure you understand your role as trustee - Many organisations will have a trustee job description or code of conduct which will be available when you join up. NCVO have a range of information resources which can help you understand more about your role in the organisation

### **Who can be a trustee?**

- Over 18 years old (generally)
- Not disqualified or bankrupted
- Not convicted of dishonesty
- Able to manage their own affairs

### **What skills and experience do I need?**

- Trustee boards need all kinds of skills to govern effectively. Any of these:
- The 'hard' skills - legal, financial, management and so on - which are necessary to understand some of the complex decisions to be taken
- The 'soft' skills - boards of trustees need people who can encourage teamworking, problem solving, asking difficult questions, decision making and, yes, to make people laugh!
- Different experiences and perspectives - charities increasingly need to be more responsive of the communities they serve. They should bring in diverse perspectives and backgrounds
- Values - trustees have an important duty and all should be able to demonstrate basic values such as honesty and integrity

### **What are the benefits of being a trustee?**

- You are at the centre of the action, helping to decide things which matter
- You can help support your community - ensure the services the charity provides meet the needs of the people they are serving
- You can put your skills and experience to good use, to benefit your community or to provide better services for people who need them
- You can learn new skills and new confidence in a whole range of areas - from finance to management to team working and decision-making - different from your previous experience

### **Before becoming a trustee, what should I know?**

As a new trustee you need to know about the charity, how it operates and your role as trustee and what is expected of you. Many charities have an induction process for new trustees which will allow you to settle in and contribute effectively whilst recognising any support needs you may have. This may include an induction pack, an opportunity to meet the Chair, fellow trustees, staff, volunteers and site visits.

### **What do I do next?**

- Read the Charity Commission's *Essential Trustee* publication (CC3) at [www.charitycommission.gov.uk](http://www.charitycommission.gov.uk)
- Contact your local Volunteer Service Council to register your interest in joining the trustee board of a local charity
- Visit [www.getonboard.org.uk](http://www.getonboard.org.uk) to register your interest in becoming a trustee and read about case studies
- Visit Volunteering England's ([www.volunteering.org.uk](http://www.volunteering.org.uk)) website to find out about volunteering in general - lots of useful information and guidance
- Membership - organisations with a membership structure may elect trustees from their membership
- Ask people who are trustees or work for charities
- Volunteering is a good first step to trusteeship, getting to know the organisation
- User representation - organisations that provide services are increasingly involving service users in their management. Service users can be recruited onto the board by invitation or through formal election
- Nomination - Sometimes a number of trustee places are reserved for representatives from specified organisations, such as funders or partner organisations

### **Other people's experience**

#### **Joining up....**

"I joined the management committee two years ago. My sister was stepping down because of childcare commitments and said they had been finding it hard to recruit trustees, so I volunteered and was elected. I had some knowledge of the organisation having covered mental health issues as a journalist.

All new trustees are given a pack describing their role and key policies in the organisation, such as the strategic plan. The first committee meeting following the AGM is an induction meeting, focusing on some element of the role of trustees.

We were split into small groups and given a list of topics, which we were asked to divide between operational and therefore management responsibility, and strategic, which would fall under the trustees' role. This is an important issue, as it's very easy for trustee boards to end up discussing operational matters when their job is to focus on the strategic questions.

Another important element in the induction and training is the visits that are organised to different parts of the organisation. The charity has several projects based in different parts of the borough. As well as its headquarters, which include therapeutic activities, a drop-in centre and café, there is an advocacy project at the local psychiatric hospital, and a mental health project for the Somali

population. Groups of two or three trustees would visit these projects and chat with the staff, which provided an essential overview of the organisation."

**No stupid questions!**

'It's important to ask questions if you are not sure,' said Peter. 'Being new to the board means there are areas of our work, such as financial management, where what seem like silly questions come into my head. Having the confidence to ask these questions is important as, of course, I along with the other trustees am ultimately responsible for the decisions taken.'

The above facts was adapted from one produced by the Trustee and Governance Team at the National Council for Voluntary Organisations  
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Helpdesk: 0800 2 798 798  
And was taken with agreement from Community Links Bromley Information Sheets  
Web:www.communitylinksbromley.org.uk

# INDUCTION OF NEW TRUSTEES

## Introduction

To be effective new trustees need to have all the information about your organisation and their role in governing it. It is a good idea to establish an induction process which all new trustees can follow. This process will differ between organisations and below are a number of steps which you may want to follow.

## Induction pack

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All new trustees should be given an induction pack. This pack should be reviewed regularly to make sure documents are up to date.

An induction pack could contain some or all of the following documents:

- Governing Document (Constitution, Memorandum & Articles of Association, etc.)
- Mission statement
- A brief history of the organisation
- Structure of the organisation – committees, sub-committees, working groups, user groups, staff and volunteers
- Information about premises
- Task descriptions of staff/volunteers
- Terms of reference for committees, sub-committees, working groups
- Minutes of previous committee meetings and AGM
- Dates of next meetings
- Annual Accounts
- Annual Reports
- Newsletters and publicity
- Business plans/strategic plans
- Reports
- Policy documents – eg. equal opportunities, quality standards
- Roles and responsibilities of trustees
  - Task descriptions of trustees and Honorary Officers
  - Profiles of trustees and contact details
  - Legal responsibilities and liability
  - Expectations of trustees (attendance at meetings, apologies, preparing for meetings and participation, etc., and expectations of the organisation (training and support, providing information in advance of meetings, etc.)

### ***Meeting people involved with the organisation***

Meetings should be arranged with key people involved in the organisation. These could include:

- Trustees, particularly Honorary officers (chair, secretary treasurer) – and try to include a trustee who has joined fairly recently
- Staff and/or volunteers
- A site visit to see the work of the organisation and to be introduced to everyone involved

Possible questions at the meetings include:

- The main aims of the organisation and its strategic plan
- Activities and services currently provided
  - how they fit into the wider structure and further the aims of the organisation
  - how they are funded
- Issues or challenges facing the organisation
- Future direction of the organisation
- How long the person has been involved
  
- What they see as the role of the committee, with reference to:
  - the division of tasks between trustees
  - the involvement of the committee in running the organisation
  - developing the strategic direction of the organisation
  - responding to changes outside the organisation
  - monitoring the quality of the organisation's work
  - managing volunteers/staff
  - involving users in the running of the organisation
  - sub-committees - how and why they are formed, who is selected to sit on them, and how they report back

### **Training or support**

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Some trustees may need extra induction or training in their legal or financial responsibilities, depending on their background or the specific role they will be taking on in the organisation. For more information on training courses for new trustees you can consult Community Links Bromley's resource library.

It may be a good idea for the new trustee to shadow an existing trustee, in order to familiarise themselves with the work required.

### **First committee meeting**

At the first meeting of a new trustee, the chair should welcome the person and invite them to:

- introduce themselves
- say what their previous involvement with the organisation has been
- say what skills and experience they bring to the organisation
- say why they decided to join the committee

Existing members of the committee should introduce themselves to the new person and describe briefly their involvement with the organisation.

### **Review meeting**

There should be a review meeting planned, to allow the new trustee to feedback with their first impressions. This could take place after six weeks.

The meeting could address the following areas:

- any further explanation of the organisation's structure or activities
- identify specific skills or interests which the trustee could contribute to the organisation
- ensuring the new trustee is fully aware of the time, commitment and responsibilities involved
- a review of support or training provided and any further support or training which may be necessary

## **Induction checklist**

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From the induction programme, the new trustee should be able to fill in the following.

Date the organisation was set up

The aims of the organisation

The activities of the organisation – projects, services, and so on

The key issues facing the organisation

Future projects or activities planned

Other people/groups the organisation works with

Number of staff

Number of volunteers

Number of members

Who funds the organisation

## **Being a trustee**

Trustees and their roles

Chair  
Secretary  
Treasurer

Other trustees

How long trustees serve for

Frequency/dates/length of meetings:

Management Committee

Sub-committees

Next AGM

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