

# The Essential Trustee

## 6 main duties



**Ensure your charity is carrying out its purposes for the public benefit**

**Comply with your charity's governing document and the law**



**Act in your charity's best interests**



**Ensure your charity is accountable**



**Manage your charity's resources responsibly**



**Act with reasonable care and skill**

# The Governance Jigsaw – The Essential Trustee (CC3)



## 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