**TRUSTEES ROLES AND RESPONSIBILITIES**

As trustees, you must:

- always act in the best interests of the charity/community organisation – you must not let your personal interests, views or prejudices affect your conduct as a trustee
- act reasonably and responsibly in all matters relating to your charity/community organisation – act with as much care as if you were dealing with your own affairs, taking advice if you need it
- only use your charity/organisation's income and property for the purposes set out in its governing document
- make decisions in line with good practice and the rules set by your governing document, including excluding any trustee who has a conflict of interest from discussions or decision-making on the matter

The Charity Commission has some excellent guidance about how you should run your community organisation. Even if you are not a charity, it is still worth reading www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3

Specific job roles are the **Chair, Treasurer and Secretary**.

**The Chair** usually

- helps plan and run trustee meetings
- takes the lead on ensuring that meetings are properly run and recorded
- takes the lead on ensuring that trustees comply with their duties and the charity is well governed
- might have a second or casting vote if a vote on a trustees' decision is tied, but only if this is specified in the charity's governing document
- may act as a spokesperson for the charity
- acts as a link between trustees and staff
- line manages the chief executive on behalf of the trustees

Job description available here http://www.governancepages.org.uk/sample-documents/jobrole-descriptions/job-description-for-a-chair/

**The Treasurer** usually takes the lead at board level on:

- making sure the organisation keeps proper accounts

- reviewing the organisation's financial performance (eg taking a spread sheet to every trustees meeting showing the current and projected financial situation)
- ensuring that the organisation has robust and effective financial controls in place
- liaising with the organisation's independent examiner or auditor if there is one.

Job description for a treasurer here
[http://www.governancepages.org.uk/sample-documents/jobrole-descriptions/job-description-for-a-treasurer/](http://www.governancepages.org.uk/sample-documents/jobrole-descriptions/job-description-for-a-treasurer/)

**The Secretary** usually takes the lead at board level on:

- preparing all agendas for meetings in consultation with the Chair
- checking the quorum of meetings
- minuting all meetings
- make notes of any action points with details of who is to action each one
- seek clarification through the chair if uncertain of how to summarise decisions or aspects of the meeting
- keep minutes together in a file or notebook along with any other documentation referred to in the meeting(s)
- ensure that action points are followed up and raise any actions not being completed with the Chair of the Trustees for agreement on a resolution.

**When to recruit trustees**

You may be recruiting trustees for the first time or you need to replace someone who's left. Even if you have a stable body of experienced trustees, refreshing your trustee board is an opportunity to:

- bring in new ways of reaching your beneficiaries
- keep pace with developments in technology
- get new ideas or contacts to help you raise funds

Think about how you want to take your organisation forward in the future and how you as trustees could develop in order to do this.

**Trustee length of service**

Your organisation's governing document may say how long trustee appointments should last, and whether trustees can be reappointed after their term ends. Otherwise there are no set limits.

**Identify the skills you have**

Your trustees may have untapped skills and experience from previous trusteeships, work or voluntary activity. A skills audit can help you build a picture of this.

As well as skills, consider if your trustees' background and experiences can help:

- bring different points of view to a discussion
- give insight into your beneficiaries' needs and experience
- make contacts in the community
- think of new ways of doing things

For example, a charity that works with young people might have young people as trustees or advisers as well as older people who bring experience. You'll get a wider range of experience if you recruit a mix of male and female trustees with different social or ethnic backgrounds and abilities.

## Who to recruit

Recruit trustees who have the experience and skills your charity needs. They need to be interested in the charity's work and be willing to give their time to help run it.

Being a trustee takes commitment. Don't appoint trustees because of their status or position in the community alone – these people may be better as patrons.

## How to encourage people to apply

To attract a broader range of trustees – including young people – you could:

- try recruitment methods other than word of mouth, such as social media, advertising or trustee recruitment websites
- encourage people who already support your charity, for example as volunteers, to become trustees
- approach local universities or colleges and their student unions

Remove any barriers that could stop someone from being a trustee, for example by:

- keeping board papers (particularly financial information) short and easy to understand
- translating documents or providing accessible formats
- making it clear that trustees can claim reasonable expenses, including help with travel and childcare
- holding meetings at venues that are accessible for people with disabilities
- having meetings at times that don't exclude people who are working or have caring responsibilities
- giving everyone a chance to contribute to discussions at meetings.