

# The Essential Trustee

## 6 main duties



# 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 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 being:

- an expert - but you do need to take reasonable steps to find out

- 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

- being prepared in case something does go wrong

## It's about:

- using your skills and experience
- deciding when you need advice
- preparing for meetings
- getting the information you need (financial, management)

- being accountable to members and others with an interest in the charity
- ensuring that staff and volunteers are accountable to the board

## It's about:

- meeting legal accounting and reporting requirements
- being able to show that your charity complies with the law and is effective
- welcoming accountability as an opportunity not a burden



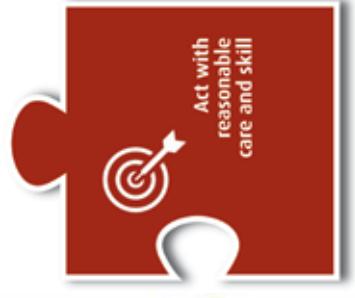
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