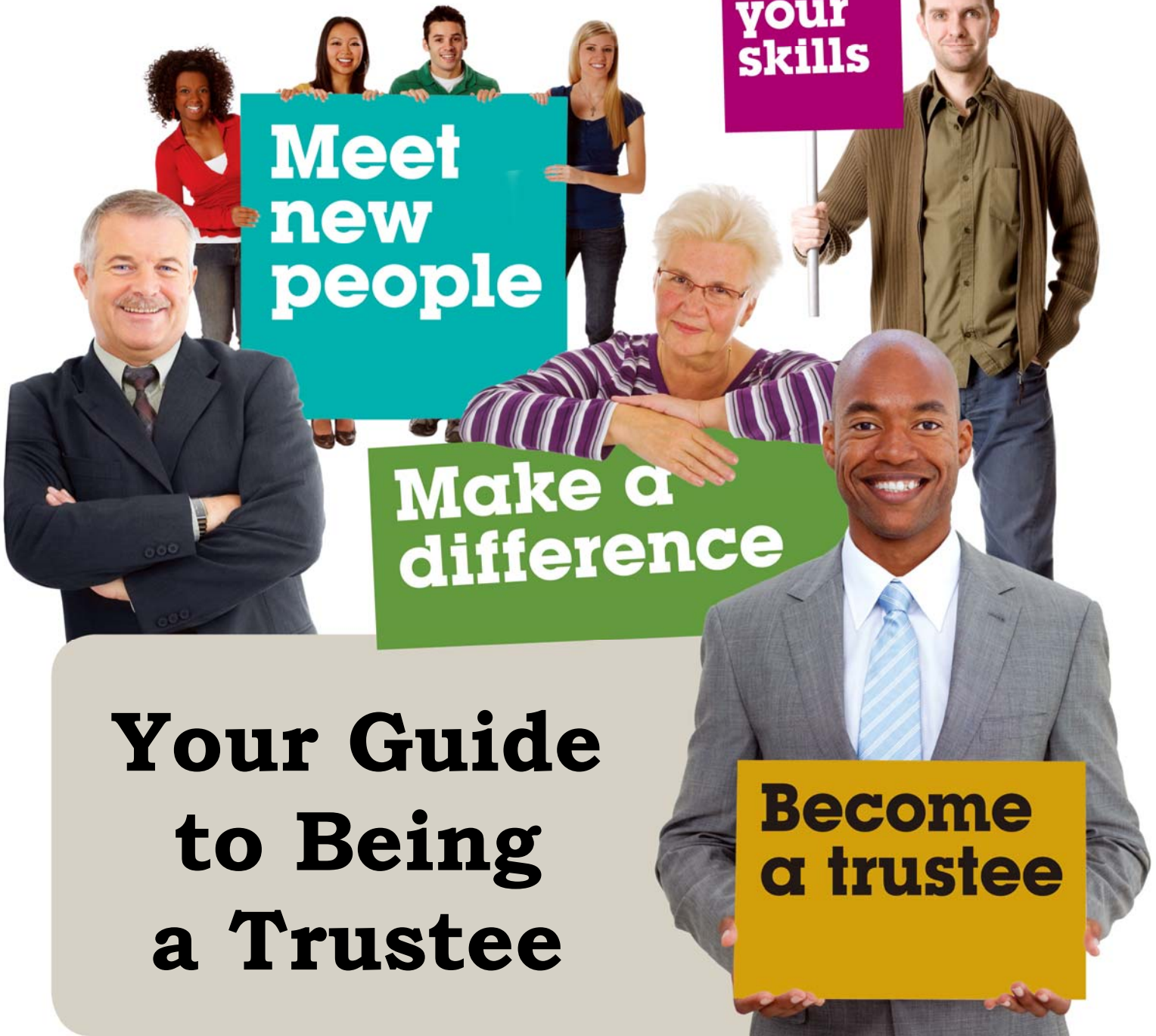


JOIN TRUSTEE
And make a difference



Your Guide to Being a Trustee

What is a trustee?

In charities and voluntary organisations throughout the country, whether it's a small group of volunteers working locally or a large complex national charity with paid staff, there is a group of people who are responsible for the organisation. These are the trustees.

Trustees work in a group which may also be known as the management committee, executive committee, steering committee, board of directors or board of trustees. It is often simply referred to as 'the board.' They all mean the same thing.

This board is the body that is legally and financially responsible for the organisation as a whole. The responsibilities and duties of trustees are outlined on page 4.

The great majority of trustees serve as volunteers and receive no payment for their work.

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What does a trustee do?

Trustees carry out a range of roles and duties that basically help the organisation to run well.

Trustees make the major decisions affecting the organisation. They are responsible for setting out the strategic direction of the charity and must be confident that it is well managed and meeting its objectives. It is the trustees' responsibility to ensure the organisation is financially secure and complies to all relevant legislation.

There are a number of specific roles that trustees can undertake, which may require specialist knowledge or experience. These are often called executive roles and are summarised on page 3.

Some facts about trusteeship

- There are over **1,000,000** trustee positions in England and Wales.
- Estimates suggest that almost **half of charities** have at least one vacancy on their board.
- Just **0.5%** of trustees in England and Wales are aged between **18 and 24** (compared with 12% of the population as a whole).
- The average age of trustees in England and Wales is **57**, two thirds are aged **50** and over.

Executive Roles

Within each trustee board there are a number of special (executive) roles; these are often taken on by people with experience or a specific skill/area of knowledge.

- Chair:** Takes a leadership role, setting the agenda and chairing meetings, taking on responsibility for the strategic vision of the organisation and acting as the link between staff and trustees. The Chair will meet regularly with the head of the organisation and may attend events or official functions on behalf of the organisation.
- Vice Chair:** Stands in for the Chair when they are not available, and may take on specific responsibilities delegated by the Chair.
- Treasurer:** Works to ensure that proper accounts are kept and to develop financial policies.
- Secretary:** Supports the chair through making arrangements for meetings, taking minutes, following up to ensure actions have been carried out and circulating papers prior to a meeting.

VODA has Information Sheets giving more detailed descriptions of each of these roles which you can download from www.voda.org.uk/information-sheets or request from us on 0191 643 2626.

What is expected of me?

No matter what your role on the board, there are a number of things expected of you as a trustee. These include:

- Being committed to your organisation and its work
- Being able to devote the necessary time and effort
- Honesty and integrity
- A commitment to equal opportunities and involving everyone in the work of the charity or organisation
- The ability to work as part of a team, to contribute and to listen to the views of others
- An understanding and acceptance of the legal duties, responsibilities and liabilities of being a trustee (see page 4).

What are my responsibilities?

This is a broad summary of some of the roles and responsibilities you have as a trustee:

- Furthering the charity's overall purpose, as set out in its governing document, and setting its direction – for example, by developing plans and strategies and monitoring progress.
- Ensuring the work of the charity is effective, responsible and legal – for example, by the use of policies and procedures and systems for monitoring and evaluating the charity's work.
- Being 'accountable' to those with an interest or stake in, or who regulate the charity – for example, by preparing annual reports and accounts and consulting with stakeholders.
- Safeguarding finances, resources and property and ensuring they are used to further the charity's purposes – for example, by insuring and documenting assets, maintaining financial systems, monitoring income and expenditure and ensuring the charity is financially sustainable or viable.
- Being clear about who carries out work on behalf of the charity – trustees, staff, volunteers – and respecting boundaries between the governance role of the board and operational or day to day matters.
- Ensuring the board operates effectively – for example, ensuring it receives the right reports and advice, by planning the recruitment and induction of trustees, providing trustees with support and training or carrying out reviews or appraisals of the board's effectiveness.

For a full and comprehensive guide to trustees' responsibilities see the Charity Commission's guidance *The Essential Trustee* - download from www.charitycommission.gov.uk/publications/cc3.aspx

VODA also has an Information Sheet: What do Trustees do? which you can download from www.voda.org.uk/information-sheets or request from us on 0191 643 2626.

Who can become a trustee?

The short answer is that almost anyone over the age of 16 (18 for certain responsibilities) can become a trustee, but there are a few restrictions.

Those not legally allowed to be trustees of a charity include those previously disqualified as a company director, or those who have been convicted of an offence involving dishonesty or deception.

Trustees come from all walks of life. You do not need to be a graduate or have a job. You do not need to be a financial expert or have management experience. Different organisations are in need of different skills and knowledge, for example it may be that your knowledge of your local area or a particular cause would be a much needed contribution.

How do I become a trustee?

Every organisation should have a formal document which explains how they operate and this will set out the process for recruiting trustees.

There are a number of ways you may become a trustee and/or find out about the opportunities available to you. These include:

- **Contact VODA:** along with our Volunteer Centre we can help you find a suitable vacancy and also help you prepare to become a trustee through training, advice and information. Visit www.voda.org.uk, email development@voda.org.uk or telephone 0191 643 2626 for more information.
- **Respond to adverts in local press/publications:** many organisations advertise their trustee vacancies the way they would advertise jobs.
- **Contact the organisation directly:** if you are interested in becoming a trustee for a particular organisation or cause then this is the quickest way to find out if they have vacancies.
- **www.do-it.org.uk:** this is a national volunteering website where you can search for opportunities. You can look for trustee roles specifically by doing an advanced search and selecting 'Trusteeship and Committee Work.'
- **NCVO's Trustee Bank:** www.ncvo-vol.org.uk/trusteebank allows you to search for current vacancies nationwide.

Why should I become a trustee?

There are lots of reasons why people become trustees. It can be a challenging, fun and rewarding role to undertake and help you make a real difference to a cause you are interested in. Trusteeship can also be about your own development as a person: learning new, diverse skills and new ways of working. See pages 7 and 8 for two North Tyneside case studies. Here are some more reasons:

- Be a more active citizen
- Make a positive contribution and serve your community
- Meet new and like-minded people
- Use your passion to help the organisation achieve its aims
- Get your ideas and opinions heard
- Work together for a common aim
- Use your skills, experience and knowledge
- Develop yourself and your career prospects
- Experience management and supervisory roles/duties
- Develop self-awareness and empathy with others
- Gain renewed sense of your self-worth and satisfaction
- Gain experience of decision-making at the highest level
- Develop skills valued by business

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Where can I find more information?

There are lots of resources and information available for trustees.

- **North Tyneside VODA:** The local infrastructure organisation for North Tyneside. We provide advice, support and training to new and existing trustees on their roles and responsibilities and any other issues they may have. We can also help organisations to recruit, induct and retain trustees and to advertise their trustee vacancies.
Visit: www.voda.org.uk, telephone 0191 643 2626, email development@voda.org.uk

Other useful websites:

- **NCVO:** www.ncvo-vol.org.uk/governanceandleadership
- **Charity Commission:** www.charity-commission.gov.uk
- **NAVCA:** www.navca.org.uk/services/trustees/

Case Study: James Dutschak Kavanagh



James Dutschak Kavanagh, 16, has been a board member with Springfield Community Association for two months, following two years as a volunteer.

Q: Can you tell us a little bit about your organisation?

Springfield Community Association is a registered charity run for the benefit of the community. It was set up after the First World War by ex-servicemen and their families in Forest Hall and West Moor as a memorial for their fallen friends and as a leisure and recreation centre for the local community. The current Springfield Community Centre was opened in 1986 and over the years it has been home to many voluntary and community groups. The Association does not employ staff. It is managed by a board of directors and various volunteers. We have 15 different regular user groups and so the Centre is in use most of the time. It is also available to hire for parties and other functions. As well as the main hall we have a small meeting room for hire too.

Q. What does your role as a trustee involve?

As a board we're only small, so everyone lends a hand with everything. We have oversight for the management of the Centre and we run regular events and activities such as our Annual Family Fun Day and table top sales. Alongside this, I look after the Association's internet platforms, providing on-call social media and web development. I also lend a hand with leaflet distribution, the preparation of reports to the management committee and making the majority of our publicity materials. I have been successful in co-ordinating sponsorship bids from a range of corporate partners such as Nestle, Tetley, Greggs, Hasbro and Pizza Hut.

Q. Why did you become a trustee?

I became a trustee to represent young people who do not otherwise have a voice. Having taken up a range of high-profile positions in the past, I thought that this would just be the next step for me. I get a real 'buzz' from helping other people and understanding each other's needs and problems. I love solving problems and by becoming a trustee, it allowed me to put this into practice.

Q. What are the greatest challenges to you as a trustee?

Being such a young trustee attracts a lot of stigma and people often think that because you are young, you cannot, or will not do a specific task to the required standard. Throughout my role as a trustee, I have gained a complex understanding of the organisation I work with and this has enabled me to apply my diverse skills set to the task in hand.

Q. What advice would you give to anyone thinking about becoming a trustee?

Becoming a trustee requires a lot of willpower. You may come across lots of barriers and so must be a strong minded individual who is willing to see projects through to their eventual completion. Do not lose heart if things do not go your way, and always think of the end goal.

Case Study: Annette Wright



Annette Wright has been volunteering with Tynemouth Volunteer Life Brigade (TVLB) for nine years.

Q: Can you tell us a little bit about your organisation?

TVLB is a totally voluntary lifesaving organisation. We operate on the North East coast between Tynemouth and Seaton Sluice and as far as Newburn up the River Tyne. We were formed in 1864 and our Watch House headquarters is a registered maritime museum with many wonderful artefacts. Our dedicated volunteers are on call 24/7, 365 days a year and we were awarded the Queen's Award for voluntary service in 2007, of which we are very proud. We not only offer a cliff and rope rescue service, we are also trained in water rescues and land searches. We assist Northumbria Police, Ambulance and Fire Fighting services as well as helicopter landings for Newcastle RVI and Freeman hospitals.

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Q. What does your role as a trustee involve?

As Honorary Treasurer of TVLB, I have to manage the finances prudently making sure that we can operate efficiently without jeopardising the service that we offer. I also do some fundraising to further our efforts. I attend monthly committee meetings along with our other 12 trustees and report on our finances. We are all encouraged to participate in any events organised to promote or fundraise for the TVLB.

Q. Why did you become a trustee and what do you enjoy most?

I have been involved with the TVLB for over 40 years through my husband who has been an active member since the 1960s and who is a trustee, Honorary Secretary and Honorary Captain. When I was nearing retirement the position of treasurer was vacant and I thought that I could fill that position. I was successful and am enjoying helping with a very worthwhile cause. I am proud to be part of a very enthusiastic team doing what they can to ensure TVLB continues.

Q. What are the greatest challenges to you as a trustee?

We have to earn between £20,000 and £25,000 annually to operate, which is always a challenge. On top of this our headquarters have been in need of renovation for many years and we have spent countless hours trying to fundraise to this end.

Q. What advice would you give to anyone thinking about becoming a trustee?

It is not to be taken lightly; every trustee has to be dedicated and do whatever they can whenever they can to help their cause.

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