

Trustee role description

About the organisation:

(Provide an overview of the organisation - its mission, legal status etc)

Role title: <Trustee>

Who they work with:

(who will the trustee work with (e.g. the Chair) and which members of staff and other trustees will they work most closely with?)

Location:

(your organisation's details/where trustees are expected to travel to)

Purpose of the Role:

(A few sentences/bullet points summarising the main responsibilities)

General responsibilities of Trustees

Becoming a Trustee for *(charity name)* can be an exciting and fulfilling role. The role of a trustee is to ensure that *(your charity's name here)* fulfils its duty to its beneficiaries and delivers on its vision, mission and values.

The board of trustees are both jointly and individually responsible for the overall governance and strategic direction of the charity, its financial health, the probity of its activities and developing the organisation's aims, objectives and goals in accordance with the governing document, legal and regulatory guidelines.

The statutory duties of all trustees include:

1. Ensuring that the organisation complies with its governing document (pursuing the objects as defined in it), charity law, company law and any other relevant legislation or regulations.
2. Maintaining financial control and ensuring that the organisation does not spend money on activities which are not included in its own objects, no matter how worthwhile or charitable those activities are.
3. Contributing actively to the board of trustees in giving firm strategic direction to the organisation, setting overall policy, defining goals and setting targets and evaluating performance against agreed targets.
4. Ensuring financial stability of the organisation, protecting and managing any charity property and ensuring the proper investment of the charity's funds.
5. Drawing up and monitoring the implementation of internal policies which must include equality and diversity, safeguarding, as well as health and safety policies and key human resources policies, including grievance and disciplinary policies.
6. Safeguarding the good name and values of the organisation and help maintain effective board performance.
7. Jointly with other trustees, holding the charity "in trust" for current and future beneficiaries

Specific responsibilities for <the named Trustee Role>

(These will depend on the role you are recruiting for – below are listed some of the responsibilities you should consider including for particular roles)

Chair

- 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
- Usually, line manages the chief executive (or most senior paid manager) on behalf of the trustees
- Leads strategic planning, setting targets and goals and monitoring performance

Treasurer

The treasurer usually takes the lead at board level on:

- Making sure the charity keeps proper accounts
- Reviewing the charity's financial performance
- Drawing up or reviewing policies for finance and investment
- Ensuring that the charity has robust and effective financial controls in place
- Develop reserves policy and safeguard the organisation's finances
- Liaising with finance staff and with the charity's independent examiner or auditor
- Reporting on financial matters to the members in a membership charity

In larger charities the treasurer may share these responsibilities with a finance committee, and staff may carry out day to day finance functions.

Other specific roles that a charity may recruit for include the Secretary or specialists in specific business or charity skills e.g. HR, Marketing, Legal, ICT, Campaigning, Fundraising etc. In small organisations trustees will be required to be much more hands on with greater potential time commitment involved. Ensure all key expected duties and responsibilities are agreed by those responsible for recruitment and included in the role description. When recruiting from the business sector – this may help you attract people as they will be able to identify exactly where their skills will fit in if they are not familiar with the charity world.

(At the end of the job description, you might also wish to include an additional line in case other duties become required in the future):

The above list of duties is indicative only and not exhaustive. The trustee will be expected to perform all such additional duties as are reasonably commensurate with the role.

Time commitment: *(number of board meetings, training commitment, other regular duties/ commitments etc)*