The Essential Trustee
6 main duties

1. Comply with your charity’s governing document and the law
   - Ensure your charity is carrying out its purposes for the public benefit

2. Ensure your charity is accountable
   - Act in your charity’s best interests

3. Manage your charity’s resources responsibly
   - Ensure your charity is accountable

4. Act with reasonable care and skill
   - Act in your charity’s best interests
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 goes 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

The Governance Jigsaw – The Essential Trustee (CC3)