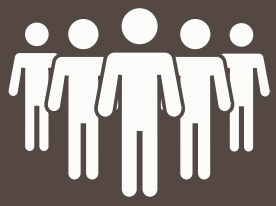
# The Essential Trustee

## 6 main duties

Ensure your charity is carrying out its purposes for the public benefit



Comply with your charity's governing document and the law



Act in your charity's best interests



Ensure your charity is accountable



Manage your charity's resources responsibly



Act with reasonable care and skill



# 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 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 does go 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