**Guiding the ship: Volunteering as a charity trustee**

**What is a trustee?**

A trustee is a volunteer who, as part of a team, gives a strategic lead to charities or voluntary organisations. Sometimes they’re called a management committee members or governors. They ensure that their organisations meet their legal requirements and their stated mission.

If you picture a charity as a sailing ship, trustees set its destination and make sure that it is running well, while the chief executive and senior managers set the course, run the crew, ensure the rigging and the rum rations are in order, and are responsible for getting to the destination on time and budget.

**What does being a trustee involve?**

Trustee boards typically meet every two or three months. Trustees are expected to attend if at all possible. Each organisation will have different arrangements, so do check how often their board meets, whether it is in the day or the evening (this is common to ensure that members don’t have to take time off work) and so on.

There may be sub-committees of the board that meet in-between the main meetings, and there may be some work associated with this – research, reports or similar projects.

There are some specific roles for trustees that most organisations will have – a Chair and a Treasurer. The Chair of trustees typically line manages the organisation’s chief executive, plans and chairs trustee meetings and takes a lead role in ensuring that the trustee board meets its responsibilities. The Treasurer’s role may include taking the lead on monitoring the organisation’s financial position, reporting to members on the financial standing, ensuring that adequate financial controls are in place, and that the organisation keeps proper accounts.

**Do I need particular skills or experience?**

Yes, but this doesn’t necessarily mean that you have to have, for example, a professional background. In general, organisations want a trustee board that brings a range of qualities. This can include particular backgrounds – e.g. management or HR experience – or knowledge/experience that might be useful to the organisation such as having been a service-user or an understanding of the voluntary sector or the particular area of work the organisation specialises in.

**Are there duties and responsibilities?**

Being a trustee isn’t an honorary position – you do have legal responsibilities. However these are carefully set out, and as long as you understand them you can avoid any problems. The charity commission sets out 6 trustee duties:

1. Ensure your charity is carrying out its purposes for the public benefit
2. Comply with your charity’s governing document and the law
3. Act in your charity’s best interests
4. Manage your charity’s resources responsibly
5. Act with reasonable care and skill
6. Ensure your charity is accountable

**Am I at risk through being a trustee?**

There are safeguards that can be taken to avoid personal risk to trustees. As long as the organisation has a recognised legal structure - such as being a registered charity or a charitable incorporate organisation you won’t be held responsible for any organisational debt. This is called ‘incorporation’ – it means the organisation is a legal body in its own right. Without incorporation it is the trustees rather than the organisation that is entering into contracts, and is therefore responsible for them. There is also trustee indemnity insurance, although opinion differs as to whether it is necessary.

Neither of these measures protect trustees if they have behaved recklessly; however cases of the Charity Commission or the courts taking action against trustees are incredibly rare. There is a recognition that trustees are volunteers lending their time to help organisations – no one seeks to punish honest mistakes.

**Is anyone barred from being a trustee?**

There is a lower age limit – 16 for charitable incorporated organisations or charities who are also companies, and 18 for other forms of charity.

Some people are disqualified from being a trustee under the Charity Act. They include people:

* with an unspent conviction for dishonesty or deception (e.g. fraud)
* who are an undischarged bankrupt
* who have been disqualified from being a company director
* who have been removed as a trustee from another charity by the Charity Commission or a court judgement.

Charities who wish to claim tax relief (e.g. Gift Aid) are required to have ‘fit and proper persons’ in management and trustee positions.

Organisations who work with children or vulnerable adults are likely to carry out criminal record checks on their trustees, and would not accept trustees with convictions that suggested they presented a danger to their service-users.

**How do I become a trustee?**

Some organisations will advertise locally or through the [Team London](https://volunteerteam.london.gov.uk/search/) or [Charity Job](https://www.charityjob.co.uk/) websites. Volunteer Centre Bexley can help too. We match volunteers with local organisations and would be happy to talk to you about your skills and the kind of organisation you’d like to support.