



Becoming a Trustee

the why, what and how...

Delivered by Rachel Ord & Fabi Toso from Reach Volunteering

- **Introduction**
- **Trusteeship - what it is; why you do it; who can be one**
- **Finding the right role for you**
- **How the process works**
- **How to get started**



Connecting people, skills and good causes

We are a national charity, established in 1979.

Our vision is to create a world where people come together to create a thriving, fair and sustainable society.



Our mission: We inspire, support and connect civil society organisations and volunteers to work together, sharing skills and expertise to create a better society.

We **connect professionals** who want to donate their skills **with charities** which need but cannot access those skills

We work **nationally**, and across **every profession**

Last year

3,959

people found
trustee or
volunteer
positions through
our service



■ Trustees

■ Volunteers for short term/ongoing projects

How many UK charities do you think there are?

- a) 7,000
- b) 70,000
- c) 170,000



with music in mind
reg. charity no. 326552



LEO ACADEMY
TRUST
LEARNING. EXCELLENCE. OPPORTUNITY.

learn to

love to

read

Trusteeship

What is a trustee?

Why be a trustee?

Who can be a trustee?

What is a trustee?

- Member of the governing **board**
- **Collectively**, legally responsible for the organisation
- **Volunteer**

Manage your charity's resources responsibly

Comply with your charity's governing document and the law

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

Act with reasonable care and skill

Act in your charity's best interests

Ensure your charity is accountable



The essential trustee: 6 main duties

What is the board's role?

- Compliance & accountability
- Stewardship of assets
- Guardians of purpose

How?

- Getting information, asking questions
- Decision making: balancing risk and opportunity
- Appointment, support and challenge of CEO

In practice....

Regularly:

- review progress against agreed plans / targets
- make decisions about services / activity in relation to the above and new needs and the external environment

Annually:

- set strategy and strategic goals / priorities
- set / agree budget
- appraise own performance as a board

In practice....

Occasionally / sometimes:

- oversee / support major projects.
- hire CEO
- recruit new trustees
- review overall vision / mission / values

Through:

- board meetings
- sub comms; working groups
- away days
- Social events / volunteering



**THE DEAF HEALTH
CHARITY
SIGNHEALTH**

Legal duties and liabilities

- As a trustee you are taking on legal duties and liabilities
- You need to understand these, and keep them in mind when choosing a role
- No need to worry unduly – there is lots of information and support available

Why be a trustee?

- Learn new **skills** & use existing skills in a new context
- Rewards of **team working**, with different & inspirational people
- Opportunity to support and shape the work and **strategic direction** of an organisation
- Make real **impact** on a cause that matters to you
- **Wellbeing** – happiness from giving

Tim, Trustee at



“I enjoy the camaraderie between the trustees.
The collective sense of responsibility to make
the right and best decisions is paramount.”

Sarah, Honorary Treasurer with



“The opportunity to contribute and learn from others”

Maria, Trustee with Charlie Chaplin Adventure Playground



“The chance to have a positive impact in the community, while gaining new skills and expertise”.

Saskia, Trustee at Reach:

“I had a vague notion that being a trustee probably wasn’t something for me and I might have discounted myself, but for a few things that made the difference.”

Who can be a trustee?

Legally – almost anyone

- Over 18
- Not disqualified (eg disqualified as a director)

Who are charities looking for?

- Someone who will strengthen their board and help them achieve their mission.
- It all depends on who they already have on board and what the charity's strategy and mission.

What every board should be aiming for:

A rich mix of **functional** skills such as:

- Financial
- Marketing & Communications
- Digital
- Legal
- HR
- Business
- Cause or activity specific (eg Medical / NHS / Retail / Property)

What every board should be aiming for:

A rich mix of **'cognitive' diversity**

- Professional experience
- Lived experience
- Representative mixture of gender, age, ethnicity etc
- Different strengths – eg visionaries / detailed

What every board should be aiming for:

Passionate and committed trustees who understand the charity's values, mission and purpose

Finding the right role for you

Things to consider include

- What **issues** or **causes** are you drawn to?
- **Size, structure & culture** of the organisation
- Your **transferable skills** and how they might benefit an organisation

Take a couple of minutes to think about **causes** you're interested in and identify your key **transferable skills**

What you should find out

Practicalities

- What is the time commitment? Are there sub committees?
- When and where are meetings?

The board

- Who are the other trustees? How long in post? How well does everyone get on with each other, the Chair and the CEO...

What you should find out

- What is the **legal structure**?
- How healthy are the **finances**?

All charities lodge their accounts on the **Charity Commission** website. Look them up!!

How do you become a trustee?

- Where to find roles
- Recruitment process
- How to apply
- What questions you should ask

How do Charities recruit trustees?

Over 70% of trustees are recruited by informal methods

But most charities are now aware of importance of open recruitment

Where do charities advertise?

- **Reach** - we are the single biggest source of trustees to the sector. Rolling register of over 500 roles
- Also Charity Job / Guardian / local volunteer centre / charity's own website / Governors for Schools

What is a typical trustee recruitment process?

- CV/ cover letter / application form
- Opportunity for informal chat / open day
- Interviews (may be informal or formal)
- Appointment (may be immediate or after observation)

Your CV

- Emphasise your **transferable** skills
- Consider cutting down on jargon / technical detail
- Consider including more personal details – eg hobbies, family circumstances

What makes a good **cover letter**?

- Show your commitment and passion
- Highlight your relevant skills
- Explain how you believe you will add value to the board

It's a two way dialogue

The process should be as much about you getting to know them as them, you

Ask questions to find out:

- Is this a cause / organisation you can commit to?
- Is the board a team you want to join?
- Due diligence....



How to get started

Sign up to **Reach** for:

- Weekly digest of roles that fit your criteria
- Upload a profile highlighting your transferable skills
- Easy to start dialogue ('Ask a question' function) and to apply
- Supported community



Join our community



Join



Create a profile



Search and apply



Find a match

Once you have joined and created your profile, you can search and apply for trustee and other skills-based opportunities.

Can I join the Reach community?

Reach Volunteering is a community for skills-based volunteers. All our volunteers must:

- Have three years demonstrable professional experience in their skill(s)
- Be based in the United Kingdom.

Still not sure if you are eligible? [Our criteria](#) should help you.

Join now

First name *

Last name *

Display name *

You can change this, but choose carefully - this will be shown on your public profile.

Spaces are allowed. Punctuation is not allowed except for full stops, hyphens, apostrophes and underscores.

E-mail *

- I have read and accept the Reach [privacy policy](#) *
- I have read and accept the Reach [terms and conditions](#) *
- I would like to receive Reach news and other information from Reach related to skills based volunteering

Join

(It's FREE!)



www.reachvolunteering.org.uk