



## Sample Trustee Role Description

**Trustee** - [ORGANISATION NAME]

**Remuneration** The role of Trustee is not accompanied by any financial remuneration, although expenses for travel may be claimed.

**Location** [LOCATION]

**Time commitment:** [NUMBER] Board meetings per year (*more detail if needed, e.g., other Committees*)

**Reporting to** Board of Trustees

### **Role Description**

The important role of a Trustee is to ensure that X Churches Trust fulfils its duty to its beneficiaries through its charitable activities and delivers on our vision, mission and values.

[INSERT VISION]

[INSERT MISSION STATEMENT]

[INSERT KEY VALUES] (*if applicable*)

### **Trustees**

The statutory duties of a trustee are:

- To ensure the organisation complies with its trust deed, constitution, or articles of association.
- To ensure that the organisation pursues its objectives as defined in its trust deed.
- To ensure the organisation applies its resources exclusively in pursuance of its objectives - the charity must not spend money on activities which are not included in its own objectives, no matter how 'charitable' and 'worthwhile' those activities are.
- To contribute actively to the Board of Trustees' role in giving firm strategic direction to the organisation, setting overall policy, defining goals and setting targets and evaluating performance against agreed targets.
- To safeguard the good name and values of the organisation.
- To ensure the effective and efficient administration of the organisation.
- To ensure the financial stability of the organisation.



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- To [*protect and manage the property of the organisation and to*] ensure the proper investment of the organisation's funds.
- [*If the organisation employs staff, to appoint the Chief Executive Officer and monitor his or her performance or to monitor the performance of other staff managed by the Board or Board members.*]

In addition with other trustees to hold the charity "in trust" for current and future beneficiaries by:

- Ensuring that the charity has a clear vision, mission and strategic direction and is focused on achieving these.
- Being responsible for the performance of the charity and for its "corporate" behaviour; ensuring that the charity complies with all legal and regulatory requirements.
- Acting as guardians of the charity's assets, both tangible and intangible, taking all due care over their security, deployment and proper application.
- Ensuring that the charity's governance is of the highest possible standard.

As well as the various statutory duties, any trustee should make full use of any specific skills, knowledge or experience to help the board make good decisions.

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.

### **Qualities of a Trustee**

#### **Essential**

- Understanding and acceptance of the legal duties, responsibilities and liabilities of Trusteeship.
- Commitment to the charity's objects, aims and values and willingness to devote time to carry out responsibilities.
- Strategic and forward looking vision in relation to the charity's objects and aims.
- Good, independent judgement, political impartiality and the ability to think creatively in the context of the organisation and external environment.
- Good communication and interpersonal skills and the ability to respect the confidences of colleagues.
- Balancing tact and diplomacy with willingness to challenge and constructively criticise.

#### **Desirable**



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- Prior experience of committee/trustee work.
- Knowledge of the type of work undertaken by the organisation.
- A wider involvement with the voluntary sector.
- Experience of committee work.
- [some experience of charity finance, charity fundraising.] *As applicable.*
- Leadership skills exercised through a period change.

### **4.0 Time Commitment**

- The Board meets at least *XX* times a year and the Chair is expected to be available *XX* times in a year.
- It is important that the Chair is available to relevant individuals on a regular basis.
- In addition to Board Meetings, other contact – usually electronic or by telephone – will be necessary.