

## Guide: Become a trustee

Trustees oversee the management and administration of a charity. They play a very important role in making sure that the charity is run well and in the interests of the people it is there to support. The role is usually unpaid.

Trustees work collectively as a 'board'. Together, they have legal responsibility for the charity and as such, they must ensure that the charity complies with the law.

### Contents

What do trustees do?

Why become a trustee?

Who can become a trustee?

What are a trustee's main duties and responsibilities?

How much time does being a trustee take?

How do I apply to be a trustee?

How easy is it to find the right match?

How and when do I commit to an organisation?

How do I choose a good trustee role?

About Reach Volunteering

### What do trustees do?

Trustees ensure their charity has a clear strategy, and that its work and goals are in line with its vision. They are the 'guardians of purpose', making sure that all decisions put the needs of the beneficiaries first.

They safeguard the charity's assets – both physical assets, including property, and intangible ones, such as its reputation – ensuring that they are used well and that the charity is run sustainably.

Trustees don't usually do the day-to-day running of the charity – they delegate this to the staff, led by the Chief Executive. Instead, they play the role of 'critical friend' to the Chief Executive by giving support and by challenging – in a supportive way – to help them manage effectively. However, in smaller charities with few staff, trustees may take hands-on roles too.

Most trustee boards meet four to eight times a year. Many boards have sub-committees that focus on particular areas of work or projects. Where they do,

trustees are often expected to get involved with one or more sub-committees, as well as having a good understanding of their charity's work overall.

## Why become a trustee?

It is estimated that almost half of all charities are looking for trustees at any time, so you will be filling a vital role.

Being a trustee can be very rewarding. As a trustee you have the chance to support and shape the work and strategic direction of an organisation, and you can make a significant difference to a cause that matters to you.

You may choose to get involved with a charity focused on a cause or an issue you are passionate about or because your life has been touched by the work of that voluntary organisation. It is also a great way to get involved in a community or find out more about the not-for-profit sector.

Being a trustee offers the opportunity for professional development. It can let you gain experience of strategy and leadership, and boost your CV. It will give you experience of being a non-executive director, such as setting a strategic vision, influencing and negotiation, and managing risk. If you already have significant experience in these areas, it can be stimulating to use it in a different and potentially challenging context. Trustees often say that being a board member has been one of the richest sources of learning in their professional lives.

As a trustee, you are part of a team and will have the opportunity to apply your unique skills and experience while learning from others. Working closely with a passionate team of people who have different perspectives is often one of the most enjoyable aspects of the role.

## Who can become a trustee?

Almost anyone can become a trustee.

Trustees come from all walks of life – what they have in common is a desire to create positive change in society. Some are retired or not working, but many work full- or part-time. Most find trusteeship fits conveniently around work, home and other commitments.

Charities benefit from having trustees with different skills, experiences and perspectives because a diverse board of trustees can make well-rounded decisions. Each charity will also want a board that reflects the people and communities it serves, to help it be as effective as possible. So most people will have something to offer as a trustee, including those who care passionately about the work of the

charity and who have a range of life experiences (for example first-hand experience of using the charity's services).

Most people over the age of 18 can become trustees, but a few will not be eligible (for example if you are disqualified as a company director). The Charity Commission provides [guidance on who can't be a trustee](#).

## What skills and qualities do trustees need?

The skills and experience that a charity will look for in a trustee will vary, but usually depend on:

- The skills and experience that the charity's existing trustees have, and the gaps that they have identified on the board.
- The charity's purpose, and what they want to achieve over the next few years.

Charities sometimes look for people with specific professional expertise – for example in finance, marketing or human resources. Sometimes they want someone with expertise in their cause, or with first-hand experience of the issues they focus on.

At other times, charities may be seeking people who can work at a strategic level and contribute more broadly.

## What are a trustee's main duties and responsibilities?

The Charity Commission sets out [six main duties for trustees](#), which are, in brief:

- Ensure your charity is carrying out its purpose for the public benefit.
- Comply with your charity's governing document and the law.
- Act in your charity's best interests.
- Manage your charity's resources responsibly.
- Act with reasonable care and skill.
- Ensure your charity is accountable.

All charity trustees have legal responsibilities, which are explained in our guide to trustees' responsibilities and liabilities (PDF, 96KB) written by Russell Cooke LLP.

However, each organisation is different, so you should also find out the situation at the organisation you are considering joining. For example, if a charity is also a company limited by guarantee, then the liabilities of a trustee are different. This is an important question to ask the charity before you make any commitment.

Trustees are not expected to be experts in every area but they are expected to use reasonable care in applying their skills and experience, and to involve professionals – including lawyers – where needed.

For information and advice on trusteeship best practice and legal requirements, read [the Charity Commission's guidance](#).

## How much time does being a trustee take?

Each organisation will expect its trustees to spend a different amount of time on the role. The only way to find out is to ask the charity.

It is important to be realistic about how much time you can commit, and when, to the potential role. The charity's needs are likely to be made up of a range of activities that may occur at different times of the day and vary across the year. Questions you should ask include:

- How many trustee meetings are there each year?
- How long are the meetings, where and at what time of day?
- Are trustees expected to serve on committees?
- What opportunities are there to spend time with the organisation observing its work, both when joining and on an ongoing basis?
- What contact is there in between trustee meetings and how does this usually take place?
- Are there any one-off events or annual occasions that trustees are expected, or will have the opportunity, to attend?
- What induction and training will the organisation provide, and how much time will that take?

## How do I apply to be a trustee?

It's a straightforward process to apply for a trustee opportunity through us and uses the same process as applying for other skills-based volunteering roles. We have a set of criteria for volunteers on our site that you should read.

You can search through the trustee vacancies before joining the Reach community, but charities will not be able to see anything about you or approach you about potential roles, and you will not be able to contact them or apply until you join.

## How easy is it to find the right match?

We find trustee roles for hundreds of people every year, so your chances of success are high. However, it can take some time to find the right match.

It is important that you ask any questions you may have and raise any doubts with the charity before making a commitment to join a board. This is as important for them as it is for you, and may lead to one or both of you deciding that you may be a better fit elsewhere.

Don't be downhearted if your first application is turned down. Charities do turn down applicants sometimes, either because they feel that someone else offers a better fit or because they don't fully understand what a candidate offers. Make sure that your skills are clearly described in your profile / application and that you have included all relevant information, such as why you are interested in the charity's cause.

## How and when do I commit to an organisation?

When you see a vacancy that you are interested in, you can contact the charity to ask questions before formally applying, so that you can find out if the role is a good match for your skills and interests. Also, before you apply for any role, do your research by visiting the organisation's website and reading its entry on the [Charity Commission's website](#).

You can ask to meet or speak with a senior staff member and/or the Chair of the organisation as part of the process, and some of the other trustees as well, either before or after you submit your application. If you are still unsure, you can also ask to attend a board meeting.

Some charities have a formal recruitment process when appointing trustees while others opt for informal meetings. Either way, there is no need to make a commitment to a trustee role until you are happy that the organisation is right for you and that you can fulfil the role.

## How do I choose a good trustee role?

Becoming a trustee is a significant commitment, so it is important to make sure you know why you are taking on a role and what is expected of you before you say yes (or no).

Some boards are better than others at helping you find the answers you want. Be polite and tactful, but persistent. A charity should be pleased that you are giving the role such careful consideration, so its reaction to your questions is worth considering, as well as the answers it gives you.

## Points you may want to consider

- Do you feel inspired by the organisation and want to be involved?

- Is the organisation clear about what it does and what it is seeking from a potential new trustee?
- Have you been provided with the information you want/need about the organisation and the way the board works?
- Have you met the other trustees? How did they make you feel? You are joining a team, so you need to want to work with them.
- Have you met any of the staff or volunteers and do you want/feel able to support them?
- Is there a good relationship between the board and the executive?
- How much time do they expect you to spend working with them as a trustee and can you make that commitment?
- Are your skills and experience appropriate and do you feel they will be valued?
- What induction and training will the organisation provide?
- Will expenses be reimbursed? Which ones? (For example the cost of travel to meetings.)
- Are your other commitments – work, home and leisure – going to allow you to undertake this commitment?
- What is the organisation's financial position? You can find the charity's accounts and [annual report for the last five years on the Charity Commission's website](#).
- Are you able and willing to complete the legal and security checks required to join the board of this organisation, including providing references and completing security checks?

The simplest question is – do you want to get involved?

When you're ready to start, join the Reach community, search for opportunities and make contact with charities.

## About Reach Volunteering

Reach Volunteering – connecting people, skills and good causes.

We are the leading skills-based volunteering charity in the UK and the single biggest source of trustees in the UK.

We connect charities with the skills and experience they need to make more of a difference. We inspire individuals to use their skills for social good and to make the most of great volunteering and trustee experiences.

[reachvolunteering.org.uk](https://reachvolunteering.org.uk)