



TOP TIPS

Becoming a Trustee

Here is our expert advice and guidance on how to be an effective Trustee. Here, we share our top tips for those wanting to undertake their first Trustee role.

WHAT IS A TRUSTEE?

Charity Trustees are the people who share ultimate responsibility for governing a charity and direct how it is managed and run. They may be called Trustees, The Board, The Management Committee, Governors, Directors or something else.

The Charity Commission states:

“Trustees are the volunteers who lead the Charities and decide how they are run. Trustees make decisions about the direction a charity takes and how its purposes will be carried out”.

ARE YOU ELIGIBLE?

Certain factors come into play to ensure you are eligible such as age and any previous offences. You can read more on the Government guidance [here](#).

WHAT ARE MY DUTIES?

The Charity Commission outlines 6 key duties as below:

- 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. Ensure your charity is accountable.**
- 5. Manage your charity's resources responsibly.**
- 6. Act with reasonable care and skill.**

To read more regarding your legal responsibilities under these duties, please visit the Government [website here](#).



WHY BECOME A TRUSTEE

Be realistic about what you want to get out of the role both professionally and personally. Being a trustee may lead to other executive opportunities but that is never a given.

BRING A NETWORK

You will need to be well networked and be able to demonstrate how your network can help the charity grow its profile in the local business community.

TIME COMMITMENT

While the duties of a trustee are not usually onerous you need to have time to fulfil them and honour your commitment. Consider how you'd balance these with your existing responsibilities before you pursue a trustee role.

STAY UPDATED

Sign up to [Charity Commission alerts](#) and connect to relevant trustee networks on LinkedIn and [Charity Connect](#).

GET AN INDUCTION

Getting an overview of how the board works will help you understand the organisation and its future plans.

MANAGEMENT EXPERTISE

Make sure you can demonstrate strong management experience. Trustee boards need people who can encourage team working, problem solving, asking difficult questions and decision making.

SKILLS MATCH

Understand how your skills balance the trustee board. Legal, financial and management skills ensure the charity functions properly and complex decisions can be made.

GET A MENTOR

Choose an existing trustee, they'll be a sympathetic ear to check ideas with. If you already know the organisation, choose a mentor from a different board. This allows you to compare experiences and seek best practice from elsewhere.

CHOOSE WISELY

Choose a charity you are passionate about. If you have personal or professional connections in the area the charity operates in, that is also preferable.

LET'S TALK

If you would like to consider becoming a Trustee please contact Sandy Hinks, Head of Charity Practice at Moon Executive Search via welcome@moonexecsearch.com 01275 371200

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