

CISWO

Trustee Training



Introduction

The Charity Commission states that:

‘Trustees have and must accept ultimate responsibility for directing the affairs of a charity, and ensuring that it is solvent, well-run, and delivering the charitable outcomes for which it has been set up.’



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In Short...

- Role of the trustee
- Compliance
- Duty of prudence
- Duty of care



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Slide Breakdown

- Role of the Trustee
- Payment & Employment
- Financial Responsibility
- Charity Property
- Duty of Care
- Problems?
- Conclusion



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Role of the Trustee

- What should I do before I become a trustee?
- Who is eligible to become a trustee?
- Who appoints new trustees?
- How do trustees make decisions?
- What do the chair and treasurer do?
- Can a trustee resign?



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Payment & Employment

- Can trustees be paid for their duties?
- Can a trustee be employed by the charity?
- Can trustees delegate responsibilities?



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Financial Responsibility

- Do trustees have to keep accounts?
- Why are accounts and a report necessary?
- What are charity trustees duties in relation to fundraising?
- What are the financial duties of trustees?
- What powers do charity trustees have when investing funds?



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Charity Property

- What duties do trustees have towards charity property?
- Can trustees buy land?
- Can trustees sell or lease land belonging to the charity?
- Can the charity borrow money on the security of its land?



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Duty of Care

- With what other laws and regulations must trustees comply?
- What are the principles for trustees?
- What is the statutory duty of care?
- How often do trustees need to meet?
- How much time will be needed?
- What else do trustees need to think about?



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Problems?

- What happens if things go wrong?
- What are the liabilities of charity trustees?
- Can a charity insure trustees against personal liability?
- Can a charity be wound up?



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Conclusion

- Any questions?

