

Guidance

# Charity trustee welcome pack

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## **Applies to England and Wales**

Publication for Northern Ireland

(<https://www.charitycommissionni.org.uk/>)

Publication for Scotland

(<https://www.oscr.org.uk/>)

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## Welcome – you're a charity trustee

Thank you for agreeing to be a trustee.

The trustee role has a special place in society and therefore its own set of legal duties. These may be different from duties you have experienced before, in previous roles.

This short guide is designed to help you navigate your first few months, including what it means to be a trustee.

# 1. Understand your trustee duties

As a new trustee, understanding your legal duties will be critical to helping you run your charity effectively. They will apply almost every time you perform your role, for example when you make decisions.

We've summarised these duties in this [guide](https://www.gov.uk/guidance/charity-trustee-whats-involved?utm_source=web&utm_medium=link&utm_campaign=Welcome&utm_id=WP) ([https://www.gov.uk/guidance/charity-trustee-whats-involved?utm\\_source=web&utm\\_medium=link&utm\\_campaign=Welcome&utm\\_id=WP](https://www.gov.uk/guidance/charity-trustee-whats-involved?utm_source=web&utm_medium=link&utm_campaign=Welcome&utm_id=WP)) and [infographic](https://assets.publishing.service.gov.uk/media/5a80ddf940f0b62305b8d98d/Jigsaw.pdf?utm_source=web&utm_medium=link&utm_campaign=Welcome&utm_id=WP) ([https://assets.publishing.service.gov.uk/media/5a80ddf940f0b62305b8d98d/Jigsaw.pdf?utm\\_source=web&utm\\_medium=link&utm\\_campaign=Welcome&utm\\_id=WP](https://assets.publishing.service.gov.uk/media/5a80ddf940f0b62305b8d98d/Jigsaw.pdf?utm_source=web&utm_medium=link&utm_campaign=Welcome&utm_id=WP)).

Here are some practical things you can do to help you meet your duties. Make sure:

- your charity's activities support its purposes and benefits the public
- you comply with your charity's governing document
- you ask yourself what's best for your charity
- you protect your charity's funds and other resources
- you regularly check that your charity's policies and processes meet its needs and are being followed
- you have the information you need to perform your role, and read it
- you follow the rules on preparing and submitting charity accounts and reports

# 2. Get to know your charity better

## 2.1 Understand your charity's purposes

Remember, your charity's purposes are what it was set up to achieve. Understanding these will help you contribute successfully as a trustee. So, check you know:

- what your charity's purposes are
- how your charity achieves its purposes
- who your charity's beneficiaries are (who it helps)

Read your charity's governing document. Trustees must comply with it. It sets out your charity's rules, such as:

- its purposes and beneficiaries
- rules about charity meetings
- powers that the trustees have

## 2.2 Find out how your charity works

Get to know the other trustees. You are collectively responsible for your charity. This includes areas where you may not be directly involved.

Pay particular attention to your charity's finances. This is a responsibility of all trustees, not just the treasurer. For example, make sure you understand:

- your charity's budgets and financial plans
- how it raises funds and spends its money
- the financial controls in place at the charity
- any concerns trustees have about your charity's finances

If the charity is not a newly registered one, you can get some of this information from your charity's accounts and trustees' annual reports.

If your charity is new, check what [requirements you must follow](https://www.gov.uk/government/publications/charity-reporting-and-accounting-the-essentials-november-2016-cc15d?utm_source=web&utm_medium=link&utm_campaign=Welcome&utm_id=WP) ([https://www.gov.uk/government/publications/charity-reporting-and-accounting-the-essentials-november-2016-cc15d?utm\\_source=web&utm\\_medium=link&utm\\_campaign=Welcome&utm\\_id=WP](https://www.gov.uk/government/publications/charity-reporting-and-accounting-the-essentials-november-2016-cc15d?utm_source=web&utm_medium=link&utm_campaign=Welcome&utm_id=WP)) for preparing your charity's end of year accounts. Think about the information you need to keep during the year to help you prepare your annual accounts and reports. And put in place the [financial controls](https://www.gov.uk/government/publications/internal-financial-controls-for-charities-cc8?utm_source=web&utm_medium=link&utm_campaign=Welcome&utm_id=WP) ([https://www.gov.uk/government/publications/internal-financial-controls-for-charities-cc8?utm\\_source=web&utm\\_medium=link&utm\\_campaign=Welcome&utm\\_id=WP](https://www.gov.uk/government/publications/internal-financial-controls-for-charities-cc8?utm_source=web&utm_medium=link&utm_campaign=Welcome&utm_id=WP)) your charity will need to protect its funds.

You should also understand your charity's approach to, for example:

- managing risks
- safeguarding
- social media
- trustee expenses

## **3. What you can expect to do soon**

### **3.1 Attend trustee meetings**

You should expect to attend trustee meetings, where you will for example check:

- your plans for the charity, and how the charity is performing against these
- the charity's financial position
- any risks the charity faces

Make sure you prepare for meetings, for example by reading documents and thinking about the agenda items before the meeting. This will help you to:

- share your views and ideas with the other trustees
- make sure that your charity is on track
- make decisions that are in your charity's best interests

Be prepared to ask questions at meetings, particularly on things you are unclear about.

### **3.2 Making decisions about your charity**

Making decisions is a key part of your role as a trustee. Some decisions will be straightforward, others more complex. Some trustees may have specialist knowledge, but be aware that you are all responsible for the decisions you make as trustees.

### 3.3 Put your charity's interests first

You must always put your charity's interests first.

Trustees' personal and professional connections can bring benefits to the work of a charity. They often form part of the reason why an individual has been asked to join a charity as a trustee. However, these connections can give rise to conflicts of interest.

A conflict of interest is any situation in which a trustee's personal interests could, or could be seen to, prevent them from making a decision that is only in the best interests of the charity.

You must manage conflicts of interest each time they arise. This is not just about complying with the law. It shows integrity, honesty and openness about what your charity does and how it does it. This in turn helps the public trust and support charities.

Further information about conflicts and making decisions is given at the end of this guide.

## 4. What charities need to send us

Your charity will most likely need to file an Annual Return with the Charity Commission every year. Different charities face different rules for reports and accounts, it depends on, for example, your charity's size. Use our [guidance \(https://www.gov.uk/guidance/prepare-a-charity-annual-return?utm\\_source=web&utm\\_medium=link&utm\\_campaign=Welcome&utm\\_id=WP\)](https://www.gov.uk/guidance/prepare-a-charity-annual-return?utm_source=web&utm_medium=link&utm_campaign=Welcome&utm_id=WP) to check the rules for your charity.

It is also your responsibility to tell us about changes to your charity such as:

- who its trustees are
- any changes you make to your charity's governing document
- if you change your charity's name

This information appears on the register of charities, and you must tell us if they change so that the register entry for your charity is correct.

Your charity will need to set up a [Charity Commission account \(https://www.gov.uk/guidance/setting-up-my-charity-commission-account?utm\\_source=web&utm\\_medium=link&utm\\_campaign=Welcome&utm\\_id=WP\)](https://www.gov.uk/guidance/setting-up-my-charity-commission-account?utm_source=web&utm_medium=link&utm_campaign=Welcome&utm_id=WP) to do this.

**So, it's over to you...**

You can read more in our [series of 5-minute guides for trustees](https://beingacharitytrustee.campaign.gov.uk/?utm_source=web&utm_medium=link&utm_campaign=Welcome&utm_id=WP) ([https://beingacharitytrustee.campaign.gov.uk/?utm\\_source=web&utm\\_medium=link&utm\\_campaign=Welcome&utm\\_id=WP](https://beingacharitytrustee.campaign.gov.uk/?utm_source=web&utm_medium=link&utm_campaign=Welcome&utm_id=WP)), designed to help you improve your knowledge and understanding of trustee duties and charity governance. They include topics such as managing finances, decision-making, conflicts of interest, and reporting.

We regularly update our guidance and share advice for charities. You can stay informed by:

- following the Charity Commission on social media ([X](https://twitter.com/charitycommission) (<https://twitter.com/charitycommission>) and [LinkedIn](https://www.linkedin.com/company/charity-commission-for-england-and-wales) (<https://www.linkedin.com/company/charity-commission-for-england-and-wales>)).
- signing up for email alerts from [our website](https://charitycommission.blog.gov.uk/subscribe/?utm_source=web&utm_medium=link&utm_campaign=Welcome&utm_id=WP) ([https://charitycommission.blog.gov.uk/subscribe/?utm\\_source=web&utm\\_medium=link&utm\\_campaign=Welcome&utm\\_id=WP](https://charitycommission.blog.gov.uk/subscribe/?utm_source=web&utm_medium=link&utm_campaign=Welcome&utm_id=WP))

We wish you every success in your role.

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