



Governance Beginner's Guide

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Governing well ensures that processes are streamlined, and decision making is efficient. Leadership teams can ensure that transparency becomes essential, making issues visible and allowing good time to take any action necessary to make sure that an organisation is always healthy and resilient.

Governing well gives those involved and interested in the organisation a sense of trust in the organisation, which will enhance your reputation and track record.

Understanding your roles and responsibilities

It is your duty as a trustee of a charity to understand your trustee duties and get to know your charity as well as possible. If you are a community group or social enterprise which includes a CIC model, then some of the guidance available to charities may not be mandatory for you, however it can be a very good guide to best practice.

The six legal duties of a Trustee

1. Making sure that your charity is carrying out its purposes as stated in your governing document.
2. Complying with the rules in your governing document and complying with law.
3. Acting in the charity's best interest.
4. Ensuring that your charity is accountable to all its stakeholders.
5. Managing the charity's resources responsibly, including finances and risk.
6. Acting with reasonable care and skill which may mean bringing in expert advice.

These legal duties mean that you will be aware of issues concerning conflicts of interest, guiding principles for decision making and being compliant with laws that are relevant to your organisation. Additionally, you should be involved in the management of finances and safeguarding reporting.

Your governing document

It is imperative that you read and understand the rules outlined in your governing document. This is particularly important when there is a conflict at board level, and you need to understand how you can behave within the confines of your governing document.

Your organisations purposes

Also stated within your governance document is the organisational purposes. Reflecting on these from time to time will enable you to avoid drifting into any projects that do not fit with what your organisation should be doing.

Make time to visit your organisation

First-hand knowledge of the people and processes of the organisation will help you to make informed decisions and understand some of the challenges that staff and volunteers face daily.

Obligations

- Attend regular meetings and put time aside to manage preparation for those meetings and follow up from those meetings.
- Manage conflicts of interest, by putting the interests of your organisation first.
- Be responsible for your personal development and training that supports you with your knowledge base.
- If you also do work for the organisation as an operational volunteer understand the difference in the two roles.

As part of the board

- Have guiding principles when making decisions.
- Review policies and procedures regularly.
- Manage finances, risk, safeguarding and reporting.

Toolkits for Trustees

[Charity Governance Code](#)

This Code is a practical tool to help charities and their trustees develop high standards of governance, which also includes a diagnostic tool for trustees.

[The Governance App](#)

The Governance App is a new free and easy way for your board of trustees to review and improve its governance together.

Useful websites to help navigate governance

[Charity Commission](#)

Guides from the Charity Commission covering many governance topics.

[NCVO](#)

NCVO are a membership community for charities, voluntary organisations and community groups in England. Their website is full of excellent resources.

[Getting on Board](#)

Getting on Board supports people to become charity trustees, particularly those who are currently under-represented on trustee boards.

[Co Operatives UK](#)


We're all about helping co-operatives – from established businesses to new-starts – be the best they can be.

Need more support?

Wirral CVS is here to help your organisation grow, develop and succeed. Whether you're just starting out or strengthening your foundations, our Development Team can provide one-to-one guidance, training, resources and advice tailored to your needs.

Contact us to book a support session

 **Email:** *info@wirralcvs.org.uk*

 **Phone:** *0151 433 3371*

 **Website:** *www.wcvs.org.uk*

More resources available at:

www.wcvs.org.uk/support

Including templates, guidance and policy tools across governance, finance, safeguarding, volunteering and more.

Disclaimer

www.wcvs.org.uk/support

This document is provided for general guidance only. It does not constitute legal advice. We recommend seeking professional support where required.

