



**CHARITY COMMISSION
FOR ENGLAND AND WALES**

Charity trustee welcome pack

Contents

1. Get to know your charity
2. Expect to do these things soon
3. Get to know your 6 trustee duties
4. What you need to send us
5. How we can help you
6. If things go wrong
7. And finally
8. Contact book

1. Get to know your charity

The first thing that you should do is to get to know your charity well.

1.1 Meet your fellow trustees

Get to know who you'll be working with, you are all equally responsible for the management of the charity. While there may be areas where you won't always be directly involved you will always remain accountable. This relationship will be key to the charity's success, so get to know your colleagues. Encourage and respect each other and the time and effort you are all prepared to give.

1.2 Read your charity's governing document and understand the rules

Each charity has its own rules for how it should operate, these are usually contained in your governing document. Make sure you know and understand yours, as it's one of the most important bits of information you will need as a trustee.

1.3 Understand the charity's purposes

Be clear on who you are there to help – the beneficiaries. You should be very clear about what the charity stands for:

- its purpose
- why it exists
- what it is looking to achieve
- how it will do this

Ask about and get yourself a copy of any strategies and plans.

1.4 Find out how it operates

Pay particular attention to the charity's finances:

- how much money does it have
- where is it held
- where does it come from and what plans are in place for spending it

Get to know how the charity works on a day to day basis. The assets and resources it has as well as its obligations.

2. Expect to do these things soon

2.1 Attend trustee meetings

Meetings will be a necessary and consistent part of your time as a trustee. There are a number of common factors in the running of any meeting such as planning or preparation. On a more practical level, though, it's the ideal time for you to provide your views and ideas. Don't be afraid to speak up, to ask questions and to use this as an opportunity to increase your knowledge. Use these occasions to make sure that the charity is on track. You should expect to be able to monitor its performance against plans and any key risks.

Find out more about [trustee meetings](#)

2.2 Make decisions

This is such an important part of your role. Some decisions will be straightforward, others more complex. Use our guidance to help you make sure your decisions are lawful, particularly when you are taking those more difficult strategic decisions, such as those affecting the charity's beneficiaries, assets or future direction.

You should be confident that you have the information you need and that decisions are considered as a group. While some trustees may have specialist knowledge that you will want to rely on be careful not to let any one individual dominate the actual decision making process.

Find out more about [decision making](#)

2.3 Feel a part of your charity

Whatever the size of your charity there is a lot to do and to take from being a trustee. You are collectively responsible for the charity's management and administration and if you have a role such as chair or treasurer then there are certain tasks that you'll need to do.

This connection provides many other opportunities to get involved. Your commitment is the biggest contribution you can make. It'll be down to you to decide how much time you can give, but it's important, as a motivated and knowledgeable trustee, that you feel a part of the charity.

Use the [Charity Governance Code](#) to help you.

You'll also need to make sure you are well informed about any key policies on areas such as risk, safeguarding and fundraising. If your charity has any involvement with those who may be at risk of abuse and neglect then safeguarding is a key priority for you.

3. Get to know your 6 trustee duties

It's important that you know these. In almost any trustee activity or decision at least one of the 6 trustee duties will be relevant. We've summarised these in [CC3a charity trustee: what's involved](#).

If at any stage you are unsure on how to act, this is the guidance you should come back to.

Here's a practical action for each of the 6 duties to help you check that you are meeting them. Always:

1. be clear that what your charity does supports its purposes and benefits the public
2. know what the rules are for your charity; what your governing document is and what it says
3. ask yourself is this what's best for the charity and who it helps. Could I, or anyone else, have a personal interest in this that needs to be declared?
4. satisfy yourself that the charity's funds, people and reputation are used sensibly and are protected from undue risk
5. use your skills and life experience. Have confidence, trust in your abilities and learn from others
6. get your charity's accounts and reports to us on time. Make sure they are to standard and clear about your achievements

4. What you need to send us

All registered charities must by law send some information to us every year. You and the other trustees are all responsible for getting this right, so you'll need to know what your charity has to send us, when it needs to be sent and that its records are up to date.

You can do this by checking:

- your [charity's registered details](#) – these include your trustee information, charity name and contact details. Check your charity's register entry as this is what the public, funders and supporters see so it's important that they are

correct. You also need to be clear about what type of charity you are as there are different requirements for [different types of charities](#)

- the [accounts that you need to give us every year](#) – all charitable incorporated organisations (CIO) must send us their accounts and trustees' annual report. Any other charity must do so if its yearly income is over £25,000. All other charities must have their accounts available to send to us or anyone else on request
- the [annual return](#) – all CIOs must send us an annual return. All other charities must do so if their income is over £10,000
- [how to send information to us](#) – your charity can send information, update details and access our online forms here. To let you do this you will need an online password. This password is important and is sent to the contact details we hold for your charity. Check who has the password, if you don't have one you can [request a new or replacement one](#). You don't need to know the password but you should know whether the charity has one and who has it.

5. How we can help you

We're here to help you understand your role and duties as a trustee. How to avoid mistakes and get it right. Use our website to:

- [look through our guidance](#) – you'll find here our extensive library of advice and guidance to match the many queries that can arise, including shorter 'how to' guides covering topics such as fundraising, managing your charity and staff and volunteers.
- help you if you need to [change your charity's name or rules](#) – you should use our online services to make these changes or when you need to get our permission to other actions.
- [keep yourself informed](#) – we will send you a quarterly newsletter (CC News) with information for trustees on key matters along with a wide range of topics. If you haven't given us your email address already you can update your charity details so that we can send this to you.
- you can also increase your awareness by following us on [Twitter](#) and by reading our [Blogs](#).

6. If things go wrong

As a trustee you are not expected to be perfect, we know things can go wrong. Charity law generally protects trustees if they have acted honestly and reasonably. Make sure that you and the other trustees can recognise if something has gone wrong and that you:

- act quickly to prevent further loss or damage
- communicate and plan what you want to say
- review the situation and learn how to stop it happening again
- let the right people know, contact the police if there's been a crime and the relevant regulators – we will need to know when there has been a serious incident

Find out more about [reporting serious incidents](#)

7. And finally

This guide has shown you the responsibilities that you have and it's important that you get to know them at this early stage. Keep it handy, so that you can refer back to it if you need to. There is a lot to take in to start with, but by getting to know this you will be able to fulfil your aims of running an effective charity that will have a positive impact on the good of others.

8. Contact book

There are a number of organisations that can provide information or assistance to trustees. These include:

- [Small Charities Coalition \(SCC\)](#) – helps trustees, staff and volunteers of small charities (those with an income of less than £1 million) access the skills, tools and information they may need
- [Association of Chairs \(AoC\)](#) – supports chairs of charities and non-profit organisations
- [National Council of Voluntary Organisations \(NCVO\)](#) – champions the voluntary sector and volunteering
- [Wales Council for Voluntary Action \(WCVA\)](#) – supporting and representing the third sector and volunteering across Wales
- [Charity Finance Group \(CFG\)](#) – champions best practice in finance management in the voluntary sector