

# Role Description for Trustees



**Role purpose:** To further the development of the charity, keeping within its charitable objectives.

## **Key responsibilities:**

1. With other Trustees, to ensure that the organisation functions within the legal and financial requirements of a charitable organisation and strives to achieve best practice.
2. To be involved in formulating and regularly reviewing the strategic aims of the Service within its charitable objectives.
3. With other Trustees, to ensure that the policy and practices of the organisation are in keeping with its aims.

## **Main duties relating to:**

1. Ensuring the organisation functions within the legal requirements of a charitable organisation
  - To agree the budget and monitor financial performances.
  - to comply with current employment and equal opportunities legislation and good practice
  - to work with the Chair to take the lead for developing specific areas of responsibility within the organisation
  - To maintain good communications with staff.
  - to take part in training sessions on ensuring good practice provided for the benefit of the trustees
  - to fulfil such other duties as may be required from time to time by the Board of Trustees
2. Formulating strategic aims
  - To consider the vision of the organisation as a whole and its beneficiaries ensuring that all the charity's activities come within its charitable objects.
  - To set overall strategy and policy objectives and to reflect them at all times.
  - To contribute specific skills interests and contacts and support the charity in fundraising activities.

### 3. Ensuring policies and practices are in keeping with aims.

- to be an active member of the Board of Trustees in exercising its responsibilities and functions
- To ensure that anyone to whom power is delegated whether honorary officers, members of staff, sub-committees reports fully and regularly to the meetings of Trustees.
- To be involved in annually reviewing the structure and role of the Board of Trustees and the effectiveness of staff representation.

## **Person Specification**

Trustees are required to be members of Money Advice and Community Support (trading as Money Advice Plus) whilst they are in post and are required to be added to the Companies House register as a Director of the company and provide relevant identification documents and information, as a Director, to our bankers. Because of the nature of our work, all trustees, staff and volunteers are required to have a Disclosure and Barring Service check.

### Essential

- Be a member of Money Advice and Community Support (trading as Money Advice Plus) with a minimum annual membership fee of £1
- Be a Director of the company (limited by guarantee) Please check that you fulfil the conditions <https://www.gov.uk/limited-company-formation/appoint-directors-and-company-secretaries>
- Be willing to provide data required to be added to the Charity Commission website, Companies House website and the Financial Conduct Authority Register – your name only will be visible to the public.
- Be registered as a Trustee and Director with our main banker (Barclays) and provide relevant identification documents
- Have a Disclosure and Barring Service check for Money Advice Plus (DBS check are not currently portable)
- Regularly attend Board meetings (currently every 2 months)
- Experience of / understanding of / willingness to learn
  - Our charity's issues
  - How our accounts work
- Be confident about our purpose and work and be an ambassador for Money Advice Plus
- Involvement:-
  - Contribute to a sub group. Currently Health and Safety, Policy & Governance, Finance, Business Development
  - contribute to email discussions