



Trustee

Role description

It is the responsibility of a Trustee of u3a in Ludlow to:

- understand the charity's purposes as set out in its governing document
- plan what your charity will do, and what you want it to achieve
- be able to explain how all of the charity's activities are intended to further or support its purposes
- understand how the charity benefits the public by carrying out its purposes
- make sure that the charity complies with its governing document
- comply with charity law requirements and other laws that apply to the charity
- do with the co-trustees (and no one else) what is decided will best enable the charity to carry out its purposes
- with co-trustees, make balanced and adequately informed decisions, thinking about the long term as well as the short term
- avoid being in a position where duty to the charity conflicts with personal interests or loyalty to any other person or body
- not receive any benefit from the charity unless it is properly authorised and is clearly in the charity's interests; this also includes anyone to whom the Trustee is financially connected, such as a partner, dependent child or business partner
- make sure the charity's assets are only used to support or carry out its purposes
- avoid exposing the charity's assets, beneficiaries or reputation to undue risk
- not over-commit the charity
- take special care when investing or borrowing
- comply with any restrictions on spending funds
- use reasonable care and skill, making use of personal skills and experience and taking appropriate advice when necessary
- give enough time, thought and energy to the role of Trustee, for example by preparing for, attending and actively participating in all trustees' meetings
- be able to demonstrate that the charity is complying with the law, well run and effective
- ensure appropriate accountability to members
- ensure accountability within the charity, particularly where responsibility for particular tasks or decisions is delegated to staff or volunteers