

What Does It Mean to Be a Charity Trustee?

Things to Consider and Research Before Joining a Board

Charities provide vital services, advocacy and community support, and their success depends heavily on the quality, commitment and governance of their trustees. A trustee role is more than a title it comes with real legal, ethical and practical responsibilities. If you're considering joining a charity board, it's essential to go in with your eyes wide open.

Below is a guide to what it means to be a trustee, what you'll need to commit to, what risks you need to consider, and how you can make a strong, meaningful contribution.

Why Trustee Roles Matter

Trustees are the stewards of a charity; they oversee its mission, safeguard its resources, set strategic direction, ensure compliance, and hold the organisation to account. The public, regulators, funders and beneficiaries trust that a charity is well governed and that its leadership acts responsibly. When trustees take their roles seriously, a charity is more likely to thrive and deliver impact.

On the other hand, weak governance, poor oversight or trustee disengagement can lead to mission drift, financial mismanagement, reputational damage - or even regulatory intervention. The Charity Commission in England & Wales offers detailed guidance on trustee duties and enforces sanctions where serious failures occur.

Here's what you need to understand before you say "yes"

Six Core Legal & Fiduciary Duties

In England & Wales, the Charity Commission's guidance "**The Essential Trustee: What you need to know, what you need to do**" (CC3) lays out six core duties that every trustee must observe.

These duties provide a useful checklist to test whether you're ready to take on a trustee role.

1. Ensure the charity is carrying out its purposes for the public benefit
2. Comply with the charity's governing document and the law
3. Act in the charity's best interests
4. Manage the charity's resources responsibly
5. Act with reasonable care and skill
6. Ensure the charity is accountable

What You Should Think Through Before Accepting a Trustee Role

Even with the legal duties above laid out, not all trustee roles are the same. Before accepting a position, consider the following questions:

1. Time Commitment & Meeting Attendance

- How many board meetings take place per year? Are there regular committees (finance, risk, audit, people, fundraising, etc.) that you must also join?
- What is the expected time for reading board papers, attending site visits, stakeholder engagement, strategy away days, subcommittee work?
- Are meetings in person or virtual? Is travel required?
- Are there peak periods (e.g. year-end accounts, fundraising campaigns) where additional time is needed?

If you cannot reasonably commit to attendance and preparation, you risk being a passive or ineffective trustee, which does no justice to the charity, its beneficiaries or your fellow trustees.

2. Understanding the Charity's Context & Challenges

- What is the financial health? Are there reserves, cash flow risks, borrowing or dependency on single funders?
- What are the major risks (operational, reputational, regulatory, safeguarding, data, funding)?
- What are the strategic priorities, and what direction is the board asking of its trustees?

- What is the current governance maturity (policies, procedures, risk frameworks, audit, compliance)?
- Do you understand the external environment, e.g. regulatory changes, sector pressures, funding trends, policy shifts?

Some of this information will be in the public domain, through charity accounts etc. but the majority can be gained from conversations with the charity chair, or recruiter.

3. Skills, Diversity & Board Mix

- What specific skills or experience does the board currently lack (finance, legal, HR, IT, public sector, community, Fundraising, digital)?
- How might your experience complement others and add genuine value?
- Does the board have diversity in background, representation and thought?
- Are you comfortable operating in a collective decision-making environment and contributing constructively?

4. Role Clarity & Delegation

- What is expected of individual trustees (beyond general board duties)?
- Are there named roles (chair, treasurer, vice chair, safeguarding trustee, fundraising lead) and are you being targeted specifically for one of these?
- Is there clarity about liaison with executive staff, reporting lines, and limits of authority?
- What is the onboarding support offered by the charity, and if you require training or development, is this available?

5. Legal Risk, Liability & Protections

- Understand that trustees, though volunteers, carry legal liability (for example, failing to comply with law, misuse of funds, breach of trust).
- The Charity Commission may take enforcement action in cases of serious mismanagement or misconduct.
- Check whether the charity carries trustee indemnity insurance and whether it covers all relevant risks.

- Clarify whether you could be disqualified (e.g. due to past insolvency, criminal convictions, removal as trustee elsewhere) - and whether you must disclose any potential conflicts.
- If the charity is also a company (charitable company), you may also carry director liabilities under company law.

6. Governance & Culture

- What is the culture of the board?
- How does the board relate to staff and volunteers and what are the lines of communication?
- Will you be encouraged to engage outside of the boardroom with others on the board (less formal networking is always encouraged to ensure effective communication)

Summary: Is Trusteeship for You?

A trustee role is both privilege and responsibility. Before you accept, ensure:

- You understand the legal, financial and reputational obligations.
- You can commit the time, energy and mindset needed.
- You bring skills, approach and integrity that will support governance, not just oversight.
- You are willing to learn, challenge, grow - and hold yourself and fellow trustees accountable.

If a charity is to succeed and maintain public trust, it needs trustees who are active partners in governance, strategy, risk and culture - individuals who bring not only their professional skills and experience, but also their time, judgement and commitment. Effective trustees don't just attend meetings; they help shape strategic direction, uphold accountability, champion values, and ensure the organisation remains resilient, transparent and focused on delivering real impact.



About Public Leaders Appointments' Trustee Development Courses

At Public Leaders Appointments, we believe that great trustees require investment in their development, whether they are new to the role, or more established and would benefit from a knowledge refresh. Our Trustee Courses are designed to help current and aspiring trustees deepen their knowledge of governance, regulatory obligations, strategic leadership and board effectiveness.

We deliver these courses to individual Boards, tailored to the charity's unique needs, and as open courses, in a variety of locations and online.

[Browse our upcoming Trustee events here.](#)

If you'd like to discuss whether a particular board role is right for you, or explore governance training bespoke to your organisation, please get in touch:

anna@publicleadersappointments.com