

## **Trustee Training**

### **Does your board understand its responsibilities?**

#### **Background**

Often, trustees on charities have joined the board because of their commitment to the cause or because they bring a particular skill to the board. The Statement of Recommended Practice for Accounting by Charities requires disclosure in the Annual Report of the Trustees about trustee induction and training.

There are many other responsibilities of trustees, which should be understood by all board members.

#### **Our trustee training**

Our team has many years of varied experience in advising charities. We can host or deliver a fully tailored training session for your board of trustees

#### **The preparation**

In order to design the training, we will meet and/or talk with:

- A member of the senior management team, typically the CEO
- A member of the board of trustees

to ascertain the areas that require coverage on the training day.

#### **The training**

The presentation will typically contain a mixture of “teaching” and interactive sessions, to ensure that trustees can relate their learning to the specific current state of the charity. Potential topics for inclusion are:

- Trustee responsibilities
- Strategic planning
- Governance
- Resource planning
- Understanding finance
- Risk management
- Controls assurance/internal audit
- Effectiveness
- Meetings and information
- Charities Act 2006
- Public benefit
- Forthcoming legislation

#### **What are the benefits?**

Our discussion will typically

- Generate a lively discussion
- Provide external insights and comparisons with other charities
- Ensure that regulatory requirements are being addressed

#### **Costs**

The costs of the training session will depend on the length and venue of the session. A fee basis will be agreed in advance.

#### **Our credentials**

Our team has many years of varied experience in advising charities. Our team members understand the multi-dimensional aspect of charity operations arising from the variety of stakeholders and regulators.

**To arrange an initial consultation meeting or for further information contact one of our Charity team on 01865 261100**