



volunteering as a charity trustee

an Early Years Alliance mini guide

Trustees play an important and crucial role in the existence of a charity, but the position carries a number of responsibilities and can sometimes be daunting for a volunteer to take on. New trustees should be made to feel like part of the charity. Providing a proper induction will ensure that they have a clear understanding of the structure of the provision and how it operates, as well as their role and responsibilities within it.

This leaflet acts as a template for Alliance member charitable settings, to provide a brief overview for potential and new trustees, on the different aspects involved in being a trustee. The information in square brackets should be amended or deleted as necessary, to suit each individual setting.

Volunteering as a charity trustee at Pollyanna Pre-School

About us

Pollyanna Pre-School aspires to enhance the education and development of children and young people in the community through the provision of high-quality childcare.

How you can help

The support you can provide as a charity trustee is extremely important to us. We value the contribution of your time and skills, as they are essential ingredients to our success.

Why volunteer?

- Are you interested in learning new skills?
- Would you like to meet new people?
- Would you like to share your skills, time and ideas with others?
- Are you passionate about the development and education of young children?

If you answer "Yes!" to any of these questions, we would love to hear from you. Volunteering as a charity trustee is all about opportunities – for the charity, but also for yourself – and from small beginnings, you could find yourself taking a new direction in life.

It offers you the opportunity to become more practically involved in the care and education of young children. You will also have a chance to update existing skills and learn new ones. This can have valuable long-term benefits when applying for jobs or undertaking further training.

What are charity trustees?

The charity trustees are in charge of running the charity, making decisions regarding its management in order to achieve its aims. This is a crucial role in the existence of a charity, but the position carries a number of responsibilities. This guide provides a brief introduction to the different aspects involved in being a trustee of our charity.

Who can be a charity trustee?

Individuals over the age of 18 years are eligible to be elected as a trustee of our charity. A few individuals may be disqualified from acting as a trustee of a charity; such as those that have an unspent conviction for an offence involving deception or dishonesty, or are bankrupt (unless they are discharged). The list of reasons that will automatically prevent someone from being a trustee will extend from 1 August 2018. If you are unsure if you are eligible, you can contact the Charity Commission for further guidance (www.charity-commission.gov.uk).

The trustee role is also subject to suitability checks by Ofsted (www.ofsted.gov.uk), which include an enhanced criminal records check. Having a criminal record will not necessarily bar you from volunteering with us. This will depend on the circumstances and background to the offence(s) disclosed.

About the role

Our trustees are jointly responsible for the effective running of the charity and may have various roles and duties. The officers (Chair, Treasurer and Secretary) are usually given certain key tasks to perform to help ensure they are carried out effectively. From time to time, we may agree to give individual trustees certain key tasks to perform to help ensure they are carried out effectively. However, our trustees are a team and must support one another so that no one person has too much work or responsibility.

We also work closely with the Manager of the setting, who is in charge on a day-to-day basis. We maintain good relations and establish a flow of news and information to ensure the setting runs efficiently and meets the children's needs. There is a culture of transparency and trust which all trustees must respect in their dealings with each other and with the setting Manager.

As a volunteer you will not be issued with a contract of employment. There will be an expectation that you will meet the role's requirements – as a charity trustee, an employer, and a registered childcare provider. To ensure that this happens, you will be given a realistic preview of what to expect from the role before you start volunteering.

Our governing document

The *Model Alliance Constitution 2011* is the legal governing document for our charity. It outlines the rules that the trustees must follow to run the charity properly and legally and will answer many of the common queries about how the charity operates. A copy will be made available to you to familiarise yourself with, as part your induction.

Charity Commission registration

We are registered as a Charitable Incorporated Organisation (CIO) with the Charity Commission, which is the body that regulates charities in England and Wales. On registration, the trustees must complete an annual return for the Charity Commission each year within 10 months of the charity's financial year-end, to ensure they are kept up-to-date with any changes to the charity or its trustees. A copy of the charity's annual report and accounts must also be submitted to the Charity Commission with the annual return.

As a charity, we are accountable to the public. The names of our trustees are publicly available on the Charity Commission Register of Charities. *For CIOs and charitable companies:* We are also required to keep a register containing certain details about all of our current and former trustees, which any person may request to see, and includes:

Disclaimer: This leaflet is only for information purposes and is not to be interpreted as legal advice. Interested parties must seek independent legal advice. A free 24/7 legal advisory helpline and an information helpline are available for Alliance members.

- the name of each trustee, including any former names;
- an address for contacting them (which can be given as the principle office of our charity);
- the date of their appointment as a trustee; and
- the date that they cease to be a trustee.

Managing the finances

An important part of your role as a trustee will be to ensure that the charity's finances comply with financial requirements and are managed in accordance with the Model Pre-school Constitution 2011. This involves keeping accurate accounting records, preparing the accounts at the end of the financial year and, in some cases, having them independently examined or audited to ensure the money is appropriately accounted for. The accounts must be accompanied by an annual report, describing the activities of the charity in the year and providing information about the management and operations of the charity.

Managing employees

As a trustee, you will be an employer of the staff who work for the charity and must comply with the laws on employment. These will involve you fulfilling responsibilities to your employees (by respecting their legal rights) and to the Government (by operating PAYE and other systems). The trustees will need to work together to supervise the work of employees and to put appropriate systems and controls in place to ensure that tasks are carried out correctly. As we are a member of the Early Years Alliance, as a trustee you will receive free access to a 24-hour legal helpline, to assist you with these responsibilities.

One trustee is appointed as the line manager for the setting Manager and is primarily responsible for her or his supervision and appraisals. While the Manager is an employee of the charity, we respect his or her professional opinion and make every effort to come to an agreement on any matters for discussion.

Ofsted and the Early Years Foundation Stage

Pollyanna Pre-School is registered as a childcare provider with Ofsted. Ofsted inspect and regulate the quality and standards of care and education in childcare settings against the outcomes and requirements of the *Statutory Framework for the Early Years Foundation Stage*.

The *Statutory Framework for the Early Years Foundation Stage* is a mandatory framework for all registered childcare providers and schools caring for children from birth to five years. It aims to ensure that all childcare services provide a safe and secure environment for children and support children's learning and development, through carefully planned play activities that are fun and appropriate to their needs.

The trustees of our charity jointly form the 'registered person' with Ofsted and have overall responsibility for ensuring the childcare provision complies with the requirements of Ofsted registration and the *Early Years Foundation Stage*. As part of your induction you will need to ensure that you are aware of these requirements. For the most part, the requirements will be delivered through the effective leadership of the staff at the setting; particularly the Manager, who will take charge of the day-to-day running of the provision.

Safeguarding children

We are committed to ensuring that children have a safe and positive environment where they can learn and develop. The role of the trustees is to ensure that all staff and volunteers are also committed to children's well-being and safety; are clear about their responsibilities to safeguard and promote children's welfare; know the procedures for highlighting any concerns; and have appropriate guidance and training to undertake their roles.

Confidentiality and data protection

As a trustee of the charity, you will come into contact with a variety of confidential personal information about staff, children, families and other volunteers. You must ensure that this information is treated with absolute confidentiality at all times and that you do not share personal information unless you are legally required to or have obtained consent from the individual whom it regards. Otherwise, you could breach the Data Protection Act, which provides strict rules in this area.

Expenses

Trustees are entitled to be reimbursed for any reasonable expenses they incur that are necessary to enable them to carry out their trustee duties.

Liability

Provided that trustees act honestly, reasonably and in accordance with the provisions of the constitution then any liabilities they incur can normally be met out of the charity's resources. However, as an unincorporated association the trustees may be liable for actions they take in the charity's name if they have acted wrongly or if the charity does not have sufficient assets to meet a liability. However, this personal liability is rare. It is also the charity's policy to put an appropriate level of reserves and insurance cover in place to safeguard against this situation.

Further information

Resources to support charity trustees are available from the Early Years Alliance www.eyalliance.org.uk and the Charity Commission www.charitycommission.gov.uk.

If you have any questions or need any further information, please get in touch!

Vanessa Whittaker - chair@pollyannapreschool.org.uk

Esther Chan – admin@pollyannapreschool.org.uk

Thank you!

Thank you for your interest in volunteering as a charity trustee with us. We extend a warm welcome and hope that you find volunteering with the charity enjoyable, fulfilling and rewarding.