

# Trustee Duties and Responsibilities

## Overall Purpose

The Board is the governing body of the organisation with the legal responsibility to ensure that the Charity is well managed and is operating within the law. The Board is also responsible for setting the strategic direction of the organisation and ensuring that activities are in line with the charitable objectives.

## Responsibilities

Detailed guidance on the responsibilities of Trustees is available on the Charity Commission website: [The essential trustee: what you need to know, what you need to do \(CC3\)](#)

1. Trustees have, and must accept, the ultimate responsibility for directing the affairs of the charity. They must ensure that it is solvent, it is being well managed and is working towards the charitable objectives it was set up to achieve.
2. Trustees must ensure that the Charity is compliant with charity law and the regulatory requirements set out by the Charity Commission. In particular, Trustees must ensure that the Charity must prepare reports on what it has achieved and Annual Returns and accounts as required by law.
3. Trustees must ensure that the Charity does not breach any of the requirements or rules set out in its governing document and that it remains true to its charitable purpose.
4. Trustees must ensure that the Charity remains solvent
5. Trustees must ensure that charitable funds and assets are used reasonably and only in furtherance of the Charity's objects.
6. Avoid undertaking activities that might place the charity's endowment, funds, assets or reputation at undue risk.
7. Trustees should take special care when investing the funds of the charity, or borrowing funds for the charity to use.
8. Trustees must use reasonable care and skill in their work as trustees, using their personal skills and experience as needed to ensure that the charity is well-run and efficient.

9. Trustees must consider getting external professional advice on all matters where there may be material risk to the charity, or where the trustees may be in breach of their Duties.

## **Personal Attributes**

1. An enthusiasm for family history and the social benefits of providing access to historical records An awareness of the value of keeping Public Records in the public domain
2. An enthusiasm for supporting volunteers
3. A commitment to carry out the duties of a Trustee
4. The ability to work as a member of a team and a willingness to state personal convictions and, equally, to accept a majority decision and be tolerant of the views of other people
5. A willingness to deal openly with staff and colleague Board members when pleased or displeased about an issue

## **Duties**

1. Work with fellow Trustees and staff where appropriate to:
2. Formulate and review the mission, strategic aims, guiding principles and overall plans for the organisation
3. Regularly review progress against objectives
4. Determine and set down policies which cover key areas of the organisation's life, and are in keeping with Free UK Genealogy's overall aims and values
5. Ensure that the organisation operates within the legal and financial frameworks which apply to Free UK Genealogy as a registered charity
6. Appoint top level staff of high quality, with skills appropriate to their responsibilities
7. Set high standards in order to achieve 'best practice' in all aspects of Free UK Genealogy's work.
8. Share skills and provide information, knowledge, contacts, funds, and other support as broadly as possible, in order to support the full range of the organisation's activities
9. Properly prepare for and regularly attend meetings of the Board of Trustees, and contribute fully to all the business conducted
10. Support the Executive Director, other staff, volunteers and any others working for the organisation
11. Keep well informed on all aspects of the work of Free UK Genealogy
12. Act as an advocate and champion for Free UK Genealogy
13. Take heed of expert advice provided on matters beyond the competence of the Board of Trustees
14. Champion Free UK Genealogy and support the fundraising effort