



**Trustee Role Descriptions: Fundraising focus
Finance focus**

Time commitment and location

- The board meets 6 times a year.
- Trustees sit on one or more sub-committees (Strategy, Finance, HR) which meet 2 times a year.
- Trustees are linked a programme team and attend c.3 staff team meetings a year.
- Meetings are held remotely, and/or in person in central London.

Main responsibilities of trustee board:

- To ensure that FM complies with its Memorandum & Articles, charity law, company law and any other relevant legislation or regulations
- To ensure that FM pursues its objects as defined in its Memorandum & Articles
- To ensure FM applies its resources exclusively in pursuit of its objects
- To contribute actively to the Board task of giving firm strategic direction to FM, setting overall policy, defining goals and setting targets and evaluating performance against agreed targets
- To safeguard the good name and values of FM
- To ensure the effective and efficient administration of FM
- To ensure the financial stability of FM
- To protect and manage FM property and to ensure the proper investment of FM funds
- To appoint the FM CEO and monitor his/her performance.

In addition to the above statutory duties, each trustee should use any specific skills, knowledge or experience they have to help the FM Board of Trustees reach sound decisions. This may involve:

- Scrutinising board papers
- Leading discussions
- Focusing on key issues
- Providing guidance on new initiatives
- Other issues in which the trustee has special expertise

Trustee with fundraising focus:

Role:

- To assist the Board to see the bigger picture; bring a fresh perspective to fundraising plans and strategy, support the organisation's fundraisers.
- To ensure fundraising is of the highest standard and priority.

Qualities:

- Fundraising/income-generation knowledge and/or business development background or having run a medium size business.
- An understanding of the challenges facing small to medium UK charities in maximising income streams & donor cultivation.
- Experience of diverse fundraising practices, including statutory funds, corporate and philanthropic giving would be valuable.
- Excellent networking skills, influencing and communication skills.

Trustee with finance focus:

Role:

- To monitor the financial standing of the charity, the financial reports and the overarching strategic management of the organisation's financial resources.

Qualities:

- Qualified accountant with demonstrated commercial awareness and knowledge.
- Knowledge of charity SORP.
- Proven ability to communicate and explain financial information to members of the Board and other stakeholders.
- Analytical and evaluation skills, demonstrating good judgement.