

ROLE DESCRIPTION FOR A TRUSTEE OF JOHN RAE SOCIETY

The duties of a trustee are as follows.

- Ensuring that the charity pursues its stated objects (purposes), as defined in its governing document, by developing and agreeing a long-term strategy
- Ensuring that the charity complies with its governing document (i.e. its constitution), charity law, and any other relevant legislation or regulations
- Ensuring that the charity applies its resources exclusively in pursuance of its charitable objects (.e. the charity must not spend money on activities that are not included in its own objects, however worthwhile or charitable those activities are) for the benefit of the public
- Ensuring that the charity defines its goals and evaluates performance against agreed targets
- Safeguarding the good name and values of the charity.
- Ensuring the effective and efficient administration of the charity, including having appropriate policies and procedures in place
- Ensuring the financial stability of the charity
- Protecting and managing the property of the charity and ensuring the proper investment of the charity's funds
- Following proper and formal arrangements for the appointment, supervision, support, appraisal of any staff the charity employs.

In addition, each trustee should use any specific skills, knowledge or experience they have to help the board of trustees reach sound decisions. This may involve scrutinising board papers, leading discussions, focusing on key issues, providing advice and guidance on new initiatives, or other issues in which the trustee has special expertise.

All the charity trustees are collectively responsible for the charity. No one individual charity trustee should have more power or control over the charity than the others. Charity trustees are not only responsible for their own actions; they are also responsible for the joint actions and decisions taken by the charity trustees.

Person specification

- A commitment to the organisation
- A willingness to devote the necessary time and effort
- Strategic vision
- Good, independent judgement
- An ability to think creatively
- A willingness to speak their mind
- An understanding and acceptance of the legal duties, responsibilities and liabilities of trusteeship
- An ability to work effectively as a member of a team
- A commitment to the key principles of public life: selflessness, integrity, objectivity, accountability, openness, honesty, and leadership.

Trustees obligations under law

The Office of Scottish Charities (OSCR) lists the following responsibilities as key to the role:

1. You act in the interests of the charity.
2. You must operate in a manner consistent with the charity's purposes.
3. You must manage any conflict of interest between the charity and any person or organisation who appoints charity trustees.
4. You must comply statutory obligations in 2005 Act
 - a. Maintaining the charity's details on the Scottish Charity Register
 - b. Notifying the OSCR of any changes in the charity and they are contacted for permission for specific changes
 - c. Financial recording and reporting
 - d. That fundraising activity complies with [Code of Fundraising Practice, and Charities and Benevolent Fundraising](#)

Please follow the link to the OSCR website for further explanation of these obligations.

<https://www.oscr.org.uk/guidance-and-forms/being-a-charity-in-scotland/charity-trustee-duties/>

Breach of charity trustee duty: What happens when charity trustees break these rules

- If a charity trustee breaks these rules, OSCR may take action in line with their [Inquiry Policy](#).
- There are lots of organisations that will support charity trustees who need help to carry out their duties or to understand what their duties are. See [Sources of help and advice](#) for details.