

Top tips for Trustees

Voluntary Action Orkney

Scottish Charity No. SCO10691
Company No. 143208

Chair



1 Keep the charity's mission at the heart of everything

Regularly bring discussions back to the organisations purpose and the difference it wants to make.

2 Listen well and encourage everyone to contribute

Create an environment where trustees feel comfortable sharing ideas, asking difficult questions and challenging decisions respectfully. Make sure quieter voices are heard and differences of opinion are welcomed.

3 Know your constitution and keep it under review

Make sure you understand your organisations constitution, including the rules around trustee responsibilities, meetings, decision-making, appointments and terms of office. Ensure the board follows these rules and schedule a formal review at least every three years to check that the constitution remains fit for purpose and reflects the organisation's needs.

4 Stay on top of trustee conflicts of interest

Make sure conflicts of interest are identified, declared and managed properly. Keep the register of interests up to date, ask trustees to declare any conflicts at the start of meetings and ensure these are recorded accurately in the minutes.

5 Make sure your policies and procedures are fit for purpose.

Regularly check that the organisation has the right policies and procedures in place to operate safely, effectively and in line with its legal and regulatory responsibilities. Ask when each policy was last reviewed and updated, who is responsible for it, and whether trustees, staff and volunteers understand how to apply it. Keep a review schedule so that policies remain current, relevant and appropriate as the charity evolves.

Secretary



1 Be organised and plan ahead

Prepare a schedule of board meetings in advance and ensure papers are circulated in good time. Keep a record of key deadlines, annual returns, policy reviews and other governance requirements so nothing important is missed.

2 Make minutes clear, accurate and useful

Minutes should capture key discussions, decisions made, actions agreed, who is responsible and deadlines. They do not need to be a word-for-word record of the meeting. Share draft minutes promptly with the Chair for review and make sure agreed minutes are securely stored.

3 Keep the OSCR trustee register up to date

Make sure the trustee records are accurate and kept up to date with the Office of the Scottish Charity Regulator (OSCR). Notify OSCR of changes to trustees, including new appointments, resignations and changes to their details, within the required timescales. Build trustee changes into your board administration checklist so that reporting requirements are not overlooked.

4 Know the constitution and governance requirements

Understand the organisations constitution or governing document and relevant policies and procedures. Help ensure meetings are called correctly, quorum requirements are met, decisions follow the proper process and trustee appointments and resignations are recorded appropriately.

5 Maintain accurate records and protect confidentiality

Keep an organised, secure record of minutes, agendas, board papers, declarations of interest and key governance documents. Handle sensitive information carefully and make sure records are accessible to those who need them while protecting confidential information.

Treasurer



1 Keep all supporting paperwork for income and expenditure

Make sure receipts, invoices, bank records and other supporting documents are retained for all money received and spent. Good record keeping provides a clear audit trail, supports financial reporting and demonstrates accountability.

2 Use a dedicated charity email address

Set up and maintain a single charity email address for accessing online services such as utilities, funding portals and supplier accounts. This helps ensure continuity when committee members change and prevents important information from being lost.

3 Have at least 2 authorised individuals on all accounts

Ensure bank accounts, utility accounts and other key organisational accounts have at least two authorised individuals with access where appropriate. This strengthens financial controls, reduces risk and helps maintain access to accounts if one person is unavailable or leaves their role.

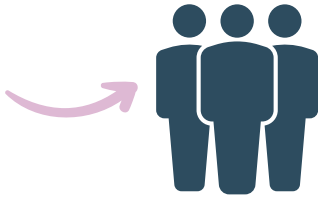
4 Count and reconcile cash in hand at the financial year-end

If your organisation handles cash, count the cash held on the final day of the financial year and reconcile it with your records. This helps ensure accounts are accurate and complete.

5 Do your bookkeeping little and often

Rather than leaving financial records until the end of the month or year, update them regularly in small, manageable chunks. This makes bookkeeping less overwhelming, helps identify issues early and keeps financial information up to date.

Trustee



1 Understand your role and responsibilities

Make sure you understand your legal duties as a trustee and what is expected of you. Act in the organisation's best interests, support its charitable purposes, use its resources responsibly and ensure you understand the constitution or governing document. Remember that being a trustee is an active responsibility, not just attending meetings.

2 Read the papers and come prepared

Take time to read board papers before meetings and think about the key issues, risks and decisions that need to be made. Ask questions if something is unclear, request further information when needed and don't be afraid to challenge assumptions constructively. Your contribution is most valuable when you are informed and engaged.

3 Share responsibility and make decisions collectively

All trustees share equal responsibility for the organisation's governance, decisions and actions. Ask questions about financial reports, potential risks and how resources are being used. Remember, responsibility does not rest with one individual trustee — the board is collectively accountable for the decisions it makes and the direction of the organisation.

4 Help identify and engage potential new trustees

Take an active role in identifying people who could bring valuable skills, experience, knowledge or fresh perspectives to the board. Think about any gaps in the board's current skills and help spread the word about trustee opportunities.

5 Put the organisations interests first

Always act in the best interests of the organisation and the people it exists to support, rather than pursuing personal interests or agendas. Make decisions that support the organisations purposes, values and long-term sustainability, even when those decisions may be difficult or differ from your own personal views.

VAO Support and Training

The team at Voluntary Action Orkney (VAO) is on hand to offer advice to trustees to help them understand their role and legal responsibilities.

They can provide training to individual trustees or full boards whether they are new or looking for a refresher.

Get in touch

Contact our Community Development Team:

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