



## The Role of a Trustee

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### Purpose

This document sets out the role and expectations of a Trustee for the Institute of Fisheries Management. It is drawn largely from guidance provided by the Charities Commission, tailored to suit IFM needs.

### Trustees six main duties

#### 1. Ensure the charity is carrying out its purposes for the public benefit

Trustees must make sure that the IFM is carrying out the purposes for which it is set up. They should:

- ensure they understand the charitable objects as set out in our governing document, how IFM benefits the public and how our activities are intended to further or support our objects
- plan what we want the IFM to do, and what we want it to achieve, aligned with those objects, seeking consensus from Trustees and involving staff, volunteers and members
- ensure there are periodic reviews of what the IFM is achieving, how effective the IFM's activities are and that its objects are still appropriate
- ensure we spend our funds on the correct purposes
- show commitment to Nolan's seven principles of public life – selflessness, integrity, objectivity, accountability, openness, honesty and leadership.

#### 2. Comply with your charity's governing document and the law

Trustees:

- must make sure that the IFM complies with our charitable objects and constitution
- must comply with charity law requirements and other laws that apply to us
- must ensure the IFM complies with relevant legislation e.g. employment, fundraising, Gift Aid or other tax reliefs and laws relating to Scotland, Wales and Northern Ireland
- must ensure that the registered charity keeps its details on the register up to date and ensure the right financial and other information is sent to the commission in their annual return
- should take reasonable steps to find out about legal requirements, for example by reading relevant guidance or taking appropriate advice when they need to.

#### 3. Act in your charity's best interests

Trustees must:

- do what the trustees (and no one else) decide will best enable the IFM to carry out its purposes
- make balanced and adequately informed decisions, thinking long term and short term
- avoid conflicts of interest

- not receive any benefit from IFM unless properly authorised and is clearly in the IFM's interest (Charity Trustees are unremunerated positions).

#### **4. Manage your charity's resources responsibly**

Trustees must act responsibly, reasonably and honestly (the duty of prudence), exercising sound judgement. Trustees:

- must make sure the IFM's assets are only used to support or carry out its purposes
- must not take inappropriate risks or over-commit with our assets or reputation, taking special care or advice when investing, borrowing entering into long term or high-value contracts and when considering legal action
- must comply with any restrictions on spending funds
- should ensure that the IFM's finances are managed to budgetary requirements and that Trustees are informed regularly about IFM's financial position
- should put appropriate procedures and safeguards in place and take reasonable steps to ensure that these are followed, to reduce the risk of fraud and theft, or being in breach of our duty.
- Should take appropriate advice when required relating to investing IFM funds.

#### **5. Act with reasonable care and skill**

As someone responsible for governing a charity, trustees:

- must use reasonable care, skill and experience, taking appropriate advice when necessary
- should give enough commitment to the role, for example by preparing for, attending and actively participating in trustees' meetings, and to speak honestly
- should ensure a Risk Management Policy is in place and is reviewed annually
- should ensure a Health and Safety Policy is in place and is reviewed annually.

#### **6. Ensure your charity is accountable**

Trustees must comply with statutory accounting and reporting requirements. They should also:

- be able to demonstrate that the IFM is complying with the law, is well run and effective
- ensure appropriate accountability to members
- ensure accountability within the charity, particularly where tasks are delegated.

## **Appointment of Trustees**

Trustees are appointed by recommendation of the Board of Trustees and are confirmed by election by the IFM's membership at the Annual General Meeting.

Trustees must understand the length of tenure.

Trustees must be over 16 years of age and must not be disqualified under the Charities Act.

Trustees must act solely in the interests of the Institute of Fisheries Management.

## **Guidance and references**

[The essential trustee - purposes and public benefit](#)

[Your governing document and the law](#)

[The essential trustee - act in your charity's best interests](#)

[The essential trustee - manage your charity's resources responsibly](#)

[The essential trustee - act with reasonable care and skill](#)

[The essential trustee - ensure your charity is accountable](#)