

Lead

Inspiring Jewish Leaders







CONTENTS

Trustees as leaders	4
Trustee matching	6
Living your values as a trustee	8
Trustee duties: where do I start?	10

TRUSTEES AS LEADERS



“Trustees have independent control over, and legal responsibility for, a charity’s management and administration. They play a very important role, almost always unpaid, in a sector that contributes significantly to the character and wellbeing of the country.

“Trusteeship can be rewarding for many reasons – from a sense of making a difference to the charitable cause, to new experiences and relationships. It’s also likely to be demanding of your time, skills, knowledge and abilities. Being aware of the duties and responsibilities [...] will help you carry out your role in a way that not only serves your charity well but also gives you confidence that you will be complying with key requirements of the law.”

*The Essential Trustee:
what you need to know, what you need to do*
Charity Commission, July 2015

Being a trustee is a great privilege and a great responsibility. Trustees, together with the CEO and Senior Leadership Team, are the key leaders of the organisation and need to ensure its future sustainability. To do this, as well as ensuring best practice governance and the highest level of income to be able to deliver the organisational aims, trustees need to keep their eyes on the big picture items – why does the organisation exist, what is our vision, how are we going to deliver that vision, how do we bring people with us?

Lead, the leadership development division of the Jewish Leadership Council, exists to develop leaders with ambition, ability and authenticity to lead our vibrant and vital Jewish community.

We believe that inspiring and mindful leadership is needed within Jewish organisations and across the Jewish community and that leaders should be given the opportunity to further develop their skills, knowledge and experiences, whether in a lay or professional capacity.

This enables leaders to promote a clear shared vision, rationale and plan for their activities so they can achieve the necessary goals they set out to. Bringing a team with you along this journey can be the difference between achieving your organisation’s goals or not.

Our annual Trustees’ Conference, run in partnership with JVN, brings together leaders from over 45 organisations, providing a fantastic opportunity for shared learning from experts in their field and communal colleagues, as well as for potentially exploring areas for collaboration.

This year’s specific theme gives the opportunity for Trustees and CEOs to think about trustees as leaders.

As American President John Quincy Adams said: “If your actions inspire others to dream more, learn more, do more and become more, you are a leader.”

Debbie Fox and Mike Webber
Lead Chairs

Nicky Goldman
Lead Executive Director

TRUSTEE MATCHING

The JVN is delighted to work in partnership with Lead to support trustees in their role and raise the profile of Trusteeships across the Jewish charity sector.

JVN has been involved in trustee recruitment and matching since its inception, almost 10 years ago. We see trusteeship as a critical aspect of volunteering, believing that if trustees are valued, informed and understanding of their role, a charity will have improved clarity about its structure and services. Their role includes ensuring that the charity has a clear deliverable vision and strategy and that it complies with financial and fiduciary responsibilities.

The JVN trustee matching service is all about people skills. Unlike our general volunteering connecting service however, we ensure that we line up the most appropriate opportunity with a CV and information that we receive from potential trustees.

We receive a role description from the charity seeking a trustee, which we would discuss with them to understand its remit and purpose. We suggest to charities that they should be tighter around the specifications that they require. The more information about the role the better, including the amount of time required and the aims and objectives of the charity.

We also ask that in any recruitment process, once we have suggested the charity to the potential trustee, the charity must invite them for an interview. Following that, we suggest the potential volunteer attends a board meeting to see whether both sides feel comfortable and that it's going to be a good fit.

Sometimes we find that the role may be well written and engaging BUT if the potential Trustee doesn't have a clear affinity with the mission of the charity, irrespective of their suitability for the role, the matching might be less successful.

Increasingly charities are asking trustees to fundraise, which can be limiting in terms of access to a potential pool of excellent trustees. This is challenging, because whilst the charities need access to funds for their sustainability, many individuals are seeking strategic roles.

If you are interested in recruiting a new trustee for your charity or if you are seeking an additional trustee role please contact Lia Bogod, Head of Volunteering at JVN: lia@jvn.org.uk.

THINK VOLUNTEERING THINK JVN

Connecting you to your perfect volunteering opportunity



For hundreds of options visit
www.jvn.org.uk or call **020 8203 6427**

 JewishVolunteeringNetwork

 @JVN_org_uk

Registered Charity Number 1130719

LIVING YOUR VALUES AS A TRUSTEE

Since I started as Chief Executive of the JLC in October 2013, I am frequently asked to speak about my experiences in my previous careers in television and sport.

I like to talk about how I have tried to apply my Jewish values in the industries that I have worked in and the challenges of having those values in, particularly, the world of sport, where I came face to face with various examples of corruption.

One hears much in industry about the values of a company, and of the desire for everybody involved with the Company to live the corporate values. Many companies spend thousands of pounds drawing up their corporate values and ensuring that they are embedded in every aspect of the business.

But, how do we bring the values that we apply in our work life to our life as a Trustee? Is there overlap between the values that we live at work and the values that we apply in the organisations of which we are Trustees? Is there a difference between our own individual values as Trustees and the values of our organisations?

When I give my talks, I highlight five values which I have tried to apply during my working career. They are

- When you give your word, people must know that it can be trusted
- Always respect the rule of law
- Always play fair and play by the rules
- Always try and show the Jewish people and Israel in the best light
- Always be respectful of other people's views

I emphasise when I speak that there are not the only values that are important to me, nor might they be key values for everybody. But they are the values that I bring to my work life.

How applicable are these to my life as a Trustee? The answer is that they are partly applicable. There are others which might also be important to apply in our roles as Trustees. One common example in the charitable world is the need to be open and transparent and to encourage the organisation to be the same. Another might be to ensure that when you volunteer, you serve the needs of the community, rather than be in it for yourself. There are many benefits to being a Trustee, but the biggest is the satisfaction of making a difference to your community through the charity you are involved in.

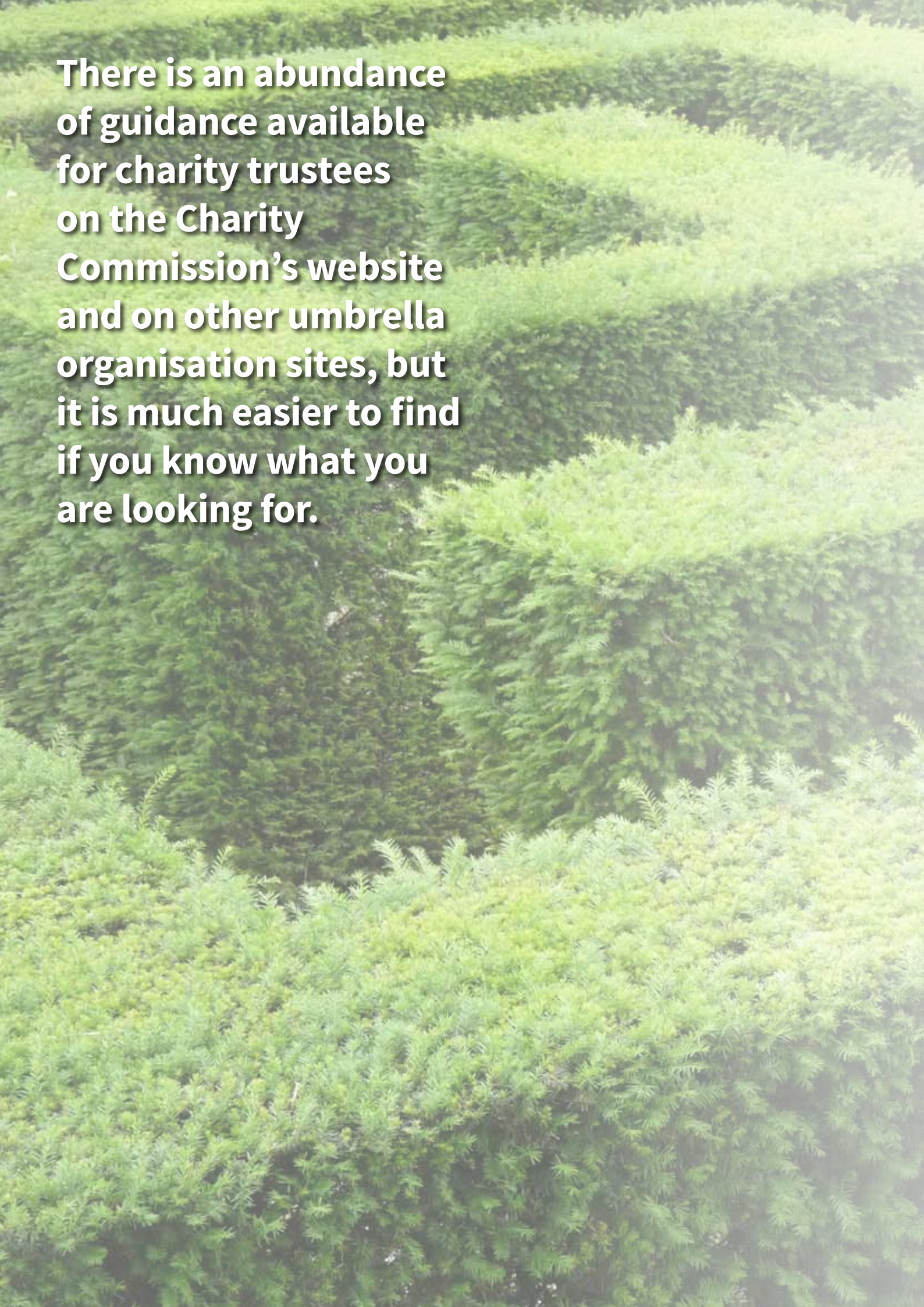
Values are as important in the charitable world as they are in the corporate world. Trustees can bring their wider experience to help the charity to live its values. But crucially, Trustees can bring their own values to the charity and in that way, develop themselves as well as the Charity.

I hope that you have the chance to bring your own values to being a Trustee and consider how you might best apply them for the benefit of the community.

Simon Johnson
Chief Executive, Jewish Leadership Council



There is an abundance of guidance available for charity trustees on the Charity Commission's website and on other umbrella organisation sites, but it is much easier to find if you know what you are looking for.



TRUSTEE DUTIES: WHERE DO I START?

We hope this list is helpful in signposting you to some of the key pieces of information and guidance. This list will also provide charity trustees with a better idea of some of the common issues that charity trustees will need to understand.

BASIC GUIDANCE

The essential Trustee: what you need to know	CC3	www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3
Charity trustee: what's involved	CC3a	www.gov.uk/guidance/charity-trustee-whats-involved
The Register of Charities		www.gov.uk/find-charity-information

PUBLIC BENEFIT

Public benefit: the public benefit requirement	PB1	www.gov.uk/government/publications/public-benefit-the-public-benefit-requirement-pb1
Public benefit: running a charity	PB2	www.gov.uk/government/publications/public-benefit-running-a-charity-pb2
Public benefit: reporting	PB3	www.gov.uk/government/publications/public-benefit-reporting-pb3

TRUSTEE BOARD

Finding new trustees	CC30	www.gov.uk/government/publications/finding-new-trustees-cc30
Users on board: beneficiaries who become trustees	CC24	www.gov.uk/government/publications/users-on-board-beneficiaries-who-become-trustees-cc24
Trustee board: people and skills		www.gov.uk/guidance/trustee-board-people-and-skills
Charity trustee: Declaration of Eligibility and Responsibility		www.gov.uk/government/uploads/system/uploads/attachment_data/file/490837/trustee_declaration_v_8.pdf
Guidance on the fit and proper persons test	HMRC	www.gov.uk/government/publications/charities-fit-and-proper-persons-test/guidance-on-the-fit-and-proper-persons-test
Charity trustees: resignation and removal		www.gov.uk/guidance/charity-trustees-resignation-and-removal
Trustee expenses and payments	CC11	www.gov.uk/government/publications/trustee-expenses-and-payments-cc11
Payments to charity trustees: what the rules are		www.gov.uk/government/guidance/payments-to-charity-trustees-what-the-rules-are

TRUSTEE DUTIES: WHERE DO I START?

MEETINGS, DECISIONS AND CONFLICTS

Charities and meetings	CC48	www.gov.uk/government/publications/charities-and-meetings-cc48
Charity meetings: making decisions and voting		www.gov.uk/guidance/charity-meetings-making-decisions-and-voting
It's your decision: charity trustees and decision making	CC27	www.gov.uk/government/publications/its-your-decision-charity-trustees-and-decision-making
Conflicts of Interest: a guide for charity trustees	CC29	www.gov.uk/government/publications/conflicts-of-interest-a-guide-for-charity-trustees-cc29

ACCOUNTS

Prepare a charity annual return		www.gov.uk/guidance/prepare-a-charity-annual-return
Prepare a charity's annual accounts		www.gov.uk/guidance/prepare-charitys-annual-accounts
Internal financial controls for charities	CC8	www.gov.uk/government/publications/internal-financial-controls-for-charities-cc8
Charity reporting and accounting: the essentials	CC15c	www.gov.uk/government/publications/charity-reporting-and-accounting-the-essentials-march-2015-cc15c
The hallmarks of an effective charity	CC10	www.gov.uk/government/publications/the-hallmarks-of-an-effective-charity-cc10

TRADING AND TAX

Charities and Trading	CC30	www.gov.uk/guidance/charities-and-trading
Trustees, trading and tax: how charities may lawfully trade	CC35	www.gov.uk/government/publications/trustees-trading-and-tax-how-charities-may-lawfully-trade-cc35
Charity trading: selling goods & services		www.gov.uk/guidance/charity-trading-selling-goods-and-services

FUNDRAISING

Charities and Fundraising	CC20	www.gov.uk/government/publications/charities-and-fundraising-cc20
Charities: working with companies and professional fundraisers		www.gov.uk/guidance/charities-working-with-companies-and-professional-fundraisers

RESERVES

Charity reserves: building resilience	CC19	www.gov.uk/government/publications/charities-and-reserves-cc19
--	------	--

INVESTMENTS

Charities and investment matters: a guide for trustees	CC14	www.gov.uk/government/publications/charities-and-investment-matters-a-guide-for-trustees-cc14
Writing your charity's investment policy	CFG/ CIG	www.cfg.org.uk/Policy/investment/~/_/media/Files/Policy/Investment/Writingyourcharitysinvestment%20policya%20guide.ashx

CHARITY LAND

Acquiring land	CC33	www.gov.uk/government/publications/acquiring-land-cc33
Sales, leases, transfers or mortgages: what trustees need to know about disposing of charity land	CC28	www.gov.uk/government/publications/sales-leases-transfers-or-mortgages-what-trustees-need-to-know-about-disposing-of-charity-land-cc28

TRUSTEE DUTIES: WHERE DO I START?

POLITICAL CAMPAIGNING

Speaking out: guidance on campaigning and political activities by charities

CC9

www.gov.uk/government/publications/speaking-out-guidance-on-campaigning-and-political-activities-by-charities-cc9

Charities, Elections & Referendums

www.gov.uk/government/uploads/system/uploads/attachment_data/file/346058/elect.pdf

PUBLIC SERVICE DELIVERY

Charities and public service delivery: an introduction and an overview

CC37

www.gov.uk/government/publications/charities-and-public-service-delivery-an-introduction-cc37

INSURANCE

Charities and insurance

CC49

www.gov.uk/government/publications/charities-and-insurance-cc49

SAFEGUARDING

Charities: how to protect vulnerable groups including children

www.gov.uk/guidance/charities-how-to-protect-vulnerable-groups-including-children

Safeguarding children and young people

www.gov.uk/government/publications/safeguarding-children-and-young-people

GRANT MAKING

Charities: due diligence checks and monitoring end use of funds

www.gov.uk/government/publications/charities-due-diligence-checks-and-monitoring-end-use-of-funds

Information for charities working internationally including legal requirements and good practice

www.gov.uk/charities-how-to-manage-risks-when-working-internationally

EQUALITY ACT

Equality Act: guidance for charities

www.gov.uk/government/publications/equality-act-guidance-for-charities

Faith-based charities

www.gov.uk/government/publications/faith-based-charities

REPORTING SERIOUS INCIDENTS

How to report a serious incident in your charity

www.gov.uk/guidance/how-to-report-a-serious-incident-in-your-charity

VOLUNTEERS

How to manage your charity's volunteers

www.gov.uk/government/guidance/how-to-manage-your-charitys-volunteers

CHARITY GOVERNANCE

Good Governance: A code for the Voluntary and Community Sector

www.governancecode.org/full-code-of-governance/

Good Governance: A code for smaller charities

www.governancecode.org/code-for-smaller-organisations/

LEAD DEVELOPS LEADERS WITH AMBITION, ABILITY AND AUTHENTICITY



CONSULTANCY



ADAM SCIENCE



TRUSTEE EVENTS



GAMECHANGERS



MENTORING

 @leadinspiringjewishleaders

 @Lead_

020 7242 9734

info@lead.thejlc.org

www.jlead.org.uk

TO LEAD OUR VIBRANT AND VITAL JEWISH COMMUNITY



Proud to support the Annual Jewish Community Trustees' Conference

HW Fisher & Company is a top 30
UK chartered accountancy firm.

Our services include audit, taxation,
business recovery, payroll and
bookkeeping.

For more information, please
contact:

Julian Challis
T 020 7380 4969
E jchallis@hwfisher.co.uk

www.hwfisher.co.uk




**HW Fisher
& Company**

CHARTERED ACCOUNTANTS



LEAD IS A DIVISION OF THE JEWISH LEADERSHIP COUNCIL

 @leadinspiringjewishleaders

 @Lead_

020 7242 9734

info@lead.thejlc.org

www.jlead.org.uk



 @JewishVolunteeringNetwork

 @JVN_org_uk

020 8203 6427

info@jvn.org.uk

www.jvn.org.uk