

| Trustee
tool kit



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Introduction

As part of our work with Trustees we have put together a host of resources and information to help General Counsel understand what a trustee role entails and how you can go about securing a position as a Trustee.



What is the Taylor Root UK Trustee Network?

The Taylor Root UK Trustee Network is a pro-bono initiative created to help our networks and communities. We speak to legal professionals on a daily basis who want to develop themselves personally and professionally, so we knew the appetite for legal professionals to become a Trustee was high.

The UK has a thriving third sector/non-profit division and there is a strong demand for legal professionals to join organisations in a Trustee capacity. Born out of this was the Taylor Root UK Trustee Network. We signpost trustee opportunities to legal professionals who want to become trustees (but we are not involved in the recruitment process).



Why become a Trustee?

Increasing numbers of GCs are looking to take on trustee appointments to support NFPs or as a stepping stone to a Non Executive Director position. This Toolkit will hopefully provide some insights and support on what a trustee position entails.



Why has Taylor Root launched this network?

- To give back to the community
- Alignment with Taylor Root's ESG commitments
- We know the importance of professional and personal development for our network and so being able to connect, help and support that journey seemed the right thing to do!



Who will it help and how?

- The NFP
- The end user that the charity supports ie: individuals, a specific cause or welfare
- You! By increasing your awareness and creative thinking on how to support an NFP (often with limited budgets and resources) you will be contributing to your own personal and professional development. You will also gain the sense of fulfilment that you are contributing to your community and the rewards in return are immeasurable!

What is the role of a Trustee?

A trustee plays a crucial role in the operation of a not-for-profit. This person is key to ensuring the organisation operates in accordance with its mission and goals.

The role of a trustee can vary depending on the organisation's structure. They are likely to be involved in both strategy and operational delivery. A Trustee will work alongside board members, the executive director and other staff, so together the organisation can achieve its goals and make a positive impact.

Generally a Trustee will be responsible for:

Governance and leadership

Trustees provide leadership and strategic direction to the organisation. They participate in the development and review of the organisation's mission, goals, and policies, and they ensure that the organisation operates in alignment with its mission.

Fiduciary responsibilities

Trustees will oversee the organisation's financial management, ensuring proper use of resources, and approving budgets.

Compliance

Trustees are responsible for ensuring that the organisation complies with all relevant laws and regulations. This includes filing necessary reports and maintaining transparency in financial and operational matters.

Risk management

Trustees assess and manage risks to the organisation. They may be involved in decision-making processes related to major initiatives, financial investments, or other significant activities.

Fundraising and resource development

Trustees often play a role in fundraising activities. They may be involved in cultivating relationships with donors, securing funding, and supporting the organisation in achieving its financial goals.

Advocacy

Some trustees may engage in advocacy efforts on behalf of the organisation, promoting its mission and representing its interests to external stakeholders.

Evaluation and accountability

Trustees evaluate the organisation's performance against its goals and may be involved in assessing the effectiveness of its programs and initiatives. They also hold the organisation's leadership accountable for achieving its objectives.

Succession planning

Trustees may be involved in planning for leadership transitions within the organisation. This includes identifying and developing potential leaders and ensuring a smooth transition when changes occur.

What value can a General Counsel add to a Trustee position?

Not-for-profit organisations (NFPs) play an essential role in our society, providing valuable services to communities across the globe. However, NFPs also face a number of challenges, including complex legal and regulatory requirements, limited resources, and competing demands from stakeholders.

A General Counsel (GC) can be a valuable asset to an NFP, providing legal expertise, strategic guidance, and risk management support. GCs can help NFPs to:



Comply with applicable laws and regulations



Develop and implement sound policies and procedures



Manage risk



Protect the interests of the NFP and its stakeholders



Achieve the NFP's mission and goals

In addition to their legal expertise, GCs can also bring a wealth of experience and skills to the table, such as:



Strategic thinking



Problem-solving



Communication



Negotiation



Leadership

GCs can be a valuable asset to any NFP, but they can be particularly helpful to NFPs that are facing complex legal and regulatory challenges as they can help to navigate these challenges and to protect their interests.

Interview questions you could be asked in a Trustee interview

As a General Counsel being interviewed for a trustee position at a not-for-profit organisation, the interviewers may want to assess your legal expertise, alignment with the organisation's mission, and your ability to fulfil the responsibilities of a trustee. Here are some interview questions you might encounter:

- Can you talk about your legal background and experience as an in-house lawyer, and how you believe it could benefit our not-for-profit organisation?
- What motivated you to apply for a trustee position in our organisation, and how familiar are you with our mission and goals?
- As a Trustee, you'll be responsible for governance and oversight. How do you envisage using your legal knowledge to support the organisation in fulfilling its mission while ensuring compliance with laws and regulations?
- Not-for-profit organisations often face various legal challenges. How do you plan to stay informed about the legal issues relevant to our organisation and address them effectively?
- Fundraising is essential for not-for-profit sustainability. How comfortable are you with contributing to fundraising efforts and leveraging your legal expertise in donor-related matters?
- Trustee roles involve working collaboratively with other board members and organisational stakeholders. Can you share examples of successful collaborative projects or initiatives you've been part of in the past?
- Ethical considerations are crucial for trustees. How would you approach conflicts of interest, and how do you ensure transparency and accountability in decision-making?
- Can you describe your experience in governance and board leadership roles, and how you plan to apply that experience to be an effective trustee for our organisation?
- How do you see yourself aligning with our organisation's culture and core values, and what excites you most about potentially joining our board of trustees?
- Our organisation values diversity, equity, and inclusion. How do you plan to contribute to these values and ensure they are reflected in the board's actions and decisions?
- Board meetings and committee work require time and commitment. How do you plan to manage your time effectively to fulfil your duties as a trustee?
- Trustee roles often involve being ambassadors for the organisation. How do you plan to represent the organisation in the community and foster strong relationships with stakeholders?

Remember to be confident in articulating your legal expertise and how it aligns with the organisation's needs. Showcase your passion for the organisation's mission and your willingness to contribute effectively as a trustee.

Interview questions you could ask in a Trustee interview

As an interviewee for a trustee position at a NFP, it's essential to ask thoughtful questions to gain a deeper understanding of the organisation, its goals, and your potential role as a trustee. Here are some questions you could ask the interviewer:

Finances

- What is the charity's income?
- What is the projected income for this year?
- What is the distribution of service delivery and administrative costs?
- How are the funds raised, and what is the percentage of each source (foundations, government, corporate, general public fundraising)
- Do you feel that this financial formula is working, and if not, how should it evolve or what are the aims?

Leadership

- Who are the staff leaders?
- Who are the board leaders? (It's recommended to have a meeting with the board chair before agreeing to join the board)
- How involved is the board? Would you like more or less involvement?
- What role do you need me to play on the board?
- What are the board term limits and are they enforced? (It's regarded as best practice in the sector to have term limits to avoid stagnation)
- Are there any key events I should attend as a trustee?

Service delivery

- What are some current programmes that are particularly successful or challenging?
- Which programmes do you envision for the future?

Planning

- Is there a strategic plan for the organisation? (If yes, ask for a copy)
- If not, is there a plan to develop one, or how are the organisation's goals set each year?
- What are the organisation's goals in the next year/3 years/5 years?
- What challenges does the organisation face?

Infrastructure

- What are the board committees? Am I expected to sit on one?
- How often does the board meet? (Ask for copies of recent minutes if allowed)
- How many staff?
- Is there any risk here? Where are the weaknesses?

Interviews with Trustees



An interview with
Fran Forsyth,
Indigo Volunteers

[Click here](#)



An interview with
Andin Fonyonga,
The Kids Network

[Click here](#)



An interview with
Aurea Garrido,
Warner Bros Discovery

[Click here](#)



An interview with
Shrina Shah,
Pure Gym

[Click here](#)



An interview with
Howard Trust,
Schroders

[Click here](#)



An interview with
Khim Kharaud,
Xero

[Click here](#)



An interview with
David Morgan,
Warburtons

[Click here](#)



An interview with
Jemilla Olufeko

[Click here](#)



An interview with
Ofei Kwafu-Akoto,
GLP

[Click here](#)

Cover letter template

Dear _____

I am OCCUPATION at EMPLOYER with a passion for SOCIAL ISSUE/MISSION. With this letter, and the attached CV, I would like to express my interest in taking up a position on the board of CHARITY.

ENTER 2-3 sentences on why you are passionate about the social issue/mission. Examples could be:

You and/or a family member/friend/loved one have experience of the social issue directly or indirectly

You lived or visited a place that was affected by the social issue

ENTER 2-3 sentences on why you admire the work of the charity with respect of this social issue/mission. Examples could be:

A program the charity runs

A recent report they produced

ENTER 2-3 sentences on why you admire the work of the charity with respect of this social issue/mission. Examples could be:

The key skills you need to use in your day job

One of two examples of any pro bono, volunteering or committees you have been involved in

SUMMARY 2-3 sentences of why you want to apply, how you will add value and gratitude for considering your application

Yours sincerely,

CV template

We have put together a series of templates to help you present yourself for a Trustee role.

Name

Contact details

Top line description of your expertise, skills, and the industry you work in.

I am actively looking to join a charity board.

Skills of relevance to a charity board: (long list of examples given here!)

- Finance
 - Change management
 - Business strategy
 - Governance and regulation
 - Legal
 - Stakeholder management
 - Sales and income generation
 - Fundraising
 - HR
 - Marketing and communication
-

Employment history

Date to preset

Job title
Description

Employer

Date to preset

Job title
Description

Employer

Date to preset

Job title
Description

Employer

Date to preset

Job title
Description

Employer

Education and qualifications

Date to Date
Qualification

University/professional body

Date to Date
Qualification

University/professional body

Date to Date
Qualification

University/professional body

Date to Date
Qualification

University/professional body

I am a full member of xxx (any professional memberships)

Hobbies and interests

For example, volunteering, sports, committee memberships, travelling. Particularly mention anything connected to the charity's cause.

I am actively looking to join a charity board.

References - on request

Resources



In House Pro Bono Group



The Charity Commission
GOV.UK



'Charity Law and Governance: A Practical Guide' by Cecile Gillard and Kirsty Semple



The essential trustee: what you need to know, what you need to do GOV.UK



National Council for Voluntary Organisation



Becoming a trustee - How charities work



The GC as Trustee: How can both General Counsel and a not-for-profit benefit?

"I think one of the skills that we bring into an organisation in that we are not scared of taking judgement calls because that's what we do every day."



Fran Forsyth
General Counsel |
Arcadis. | Trustee,
Indigo Volunteers

"It makes sense to focus on an area that you're interested in and that you can relate to and have a passion for, but it's good to know that [as General Counsel] your skill set is so diverse in terms of application."



Robin Chalmers
Chief Legal Counsel |
All 3 Media International.
Trustee, The Film and
TV Charity

Get in touch



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“I think that lawyers are generally very rounded intelligent human beings with a great network and a good understanding of life and take the emotion out of decisions. [As a CEO] it’s nice to have someone to say, okay, this is the situation.”



Lucy Philipson
CEO | COCO

About Taylor Root

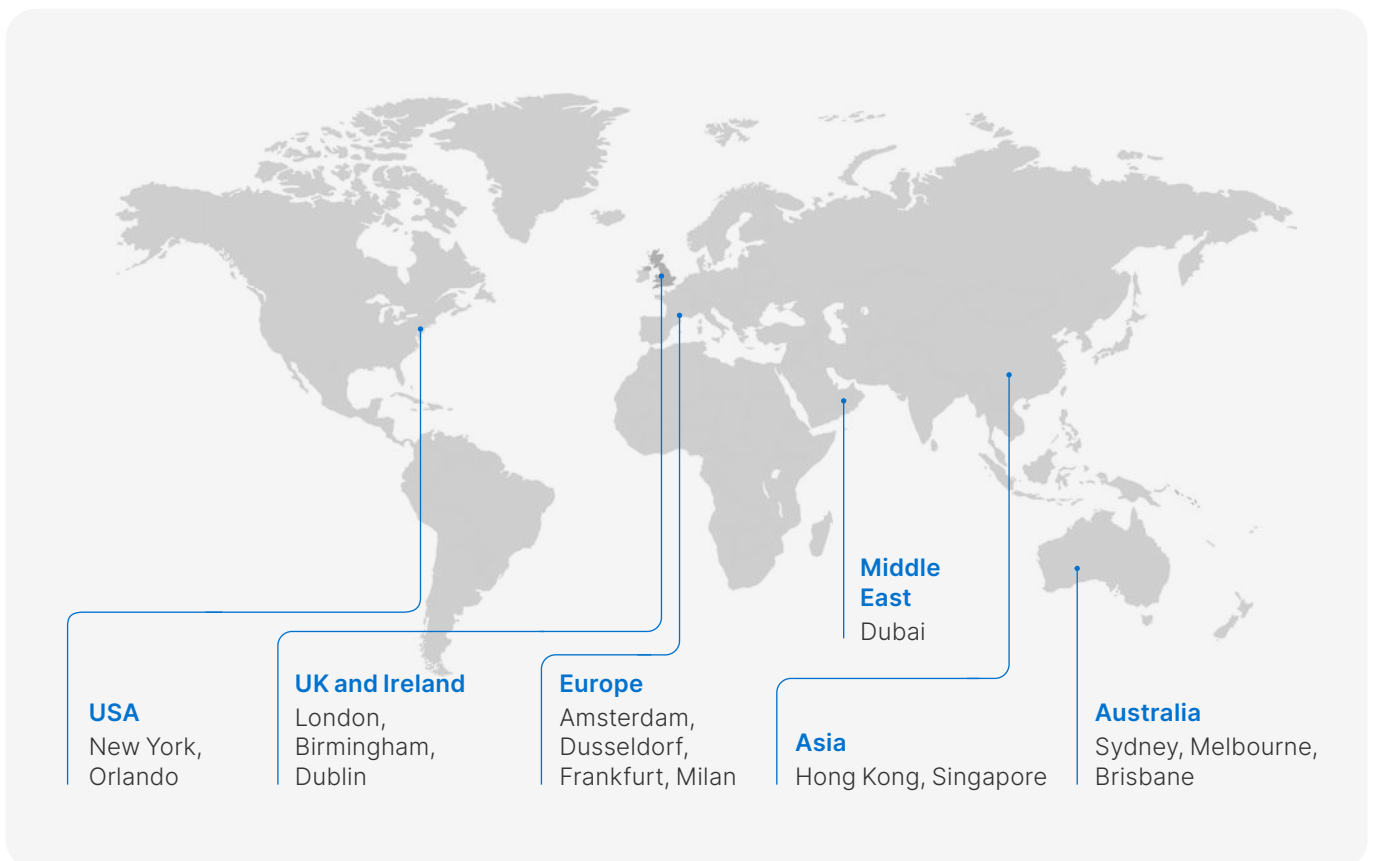
We are a global legal, risk and compliance search and recruitment consultancy and have been a market leader for more than 30 years.

We help global law firms and businesses to build and expand their legal, risk, compliance and corporate governance functions. Whether you're hiring your first In-house Counsel, expanding your associate team in a certain practice area or expanding your risk department internationally, we partner with businesses at every step of your journey.

Our services include contingent and retained search, permanent, temporary and interim recruitment as well as consultancy solutions.

Wherever we operate we have made an impact, from Düsseldorf to Dubai, New York to Shanghai or Milan to Melbourne. From pioneering specialist recruitment in particular locations, to shaping how our clients have approached hiring, our influence is evident everywhere.

We have a truly global network of search and recruitment experts. Put simply, no one can match our global reach, or our history.








About our specialist recruitment brands

We're part of The SR Group, a global search and recruitment company that includes specialist search and recruitment consultancies Brewer Morris, Carter Murray, Frazer Jones, Keller West and Taylor Root.

With strong management, a clear vision and the recruitment, training and retention of inspiring people, we have developed successful brands synonymous with quality around the world.

Each of these brands support clients on mandates at all levels of seniority, from entry-level through to Heads of, Director and C-Suite positions on both a permanent and interim basis.

	<p>Brewer Morris is a trusted tax, treasury and senior finance search and recruitment consultancy.</p> <p>Through integrity, flexibility, specialist</p>	<p>expertise and always delivering results, we've built lasting relationships with professionals and businesses.</p> <p>brewermorris.com</p>
	<p>Carter Murray is a global search and recruitment consultancy dedicated to marketing and sales.</p> <p>Through deep expertise within our</p>	<p>markets, we're consistently able to fulfil even the most complex briefs and match the best specialist to every role.</p> <p>cartermurray.com</p>
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