



# **The Role of the New Trustee in Fundraising**

the  
Trustee Conference  
2008



# Session Overview

- Welcome and Introduction
- 12 main roles of trustees
- Role of trustees in fundraising
- The right framework
- Fundraising checklist
- Active trustees
- Frequently asked questions



# 12 Main Roles of Trustees

- Board performance
- Promote organisation
- Vision mission values
- Strategy
- Policies
- Employment Procedures
- Governing Document
- Accountability
- Compliance
- Fiscal oversight
- Support CEO
- Respect staff



# The Role of Trustees in Fundraising

- Trustees must ensure that any fundraising activity carried out by, or on behalf of, their charity is properly undertaken, and that all funds collected are properly accounted for.
- The ultimate legal responsibility of ensuring that the fundraising meets the requirements of the organisation's business plan



# The Right Framework

- Trustee guidelines
- Organisational business plan
- Costings for business plan
- Overall funding / income generation strategy
- Legal and ethical implications and details
- Other relevant policies and procedures
- Information on tax implications, tax effective giving etc



# The Right Framework

- Sponsorship possibilities (and non starters)
- Overview of fundraising methodology
- Adequate resources to support trustee involvement
- Training / development budget
- Communications strategy



# Fundraising Checklist

- A sound and stable organisation
- A good and compelling cause
- Good projects / services / activities
- A substantial and attractive case for support
- Specific details of “packages”
- Facts and figures to back up identified need



# Fundraising Checklist

- Other committed and quality leaders (voluntary and professional) involved
- Financial commitment from those involved
- Adequate support and resources available
- Good research
- Identification of all negative questions – with documented and agreed responses
- Skills to use a choice of fundraising techniques



# **Active Trustees** **by Sheron Ferguson**

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# **Active Trustees by Robin Brady**

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# Frequently Asked Questions

