

# Trustee Training Courses



**A superb one-day course to  
bring new trustees up-to-speed  
fast and refresh existing trustees'  
understanding of their role**

Partner:



**governance**  
essential information for effective trustees

# The need for trustee training

As a chief executive, chair, existing or new trustee you will no doubt be aware of the Charity Commission's requirements on trustee induction. Without proper induction it can take a new trustee a year or more to become effective. It is vital therefore to provide high quality training as soon as possible after the trustee is appointed. A good induction programme has two distinct strands:

- training on the generic responsibilities and role of the trustee (provided by this course); and
- induction to your specific organisation (provided by you).

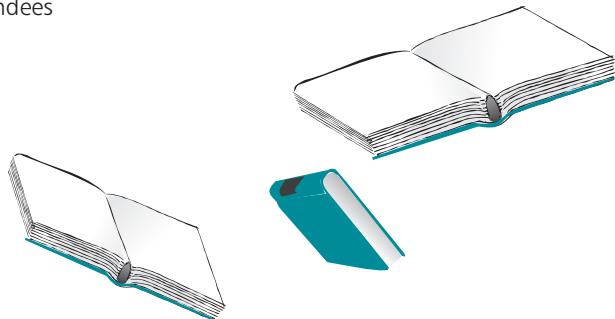
By sending trustees on this carefully designed one-day course, chief executives and chairs can swiftly tick off the first of the two requirements, allowing themselves more time to concentrate on inducting new trustees into the specific requirements of their particular charity.

Led by ***governance*** editor and leading charity trustee, Dorothy Dalton, the course draws on Dorothy's vast experience and unrivalled knowledge of the sector to provide attendees with the best possible understanding of what it means to be a trustee today.

Though the course is an effective way of meeting the training requirements for new trustees, it also acts as a powerful refresher course to existing trustees who will need to keep abreast of changes in legislation and evolving case law. Specific areas covered include:

- **roles, responsibilities and liabilities** of trustees;
- what trustee boards **should** be doing: what is governance really?
- governing **without managing**;
- **information needed** to govern well;
- **relationship** with the chair of trustees and the chief executive; and
- understanding **charity finance**.

Additionally, why not reap the benefits of meeting others from the field? The course will allow trustees to network and share information with those from other organisations meaning they will return to the board with new knowledge, new perspectives and a new determination to effectively govern the charity.



# Programme

9.30am **Registration and coffee**

10.00am **Introduction**

What is expected of trustees:

- collective authority and responsibility of trustees;
- acting solely in the interests of the charity;
- not benefiting.

When trustees can be personally liable.

11.00am **Tea and coffee**

11.15am **Trustees' job description**

The three key strands of governance: corporate/fiduciary; strategic and impact.

12.15pm **Information needs of trustees**

When too much detail is dangerous – when detail could be important.

Issues to be addressed by trustees – why agendas are important.

1.15pm **Lunch**

2.15pm **Understanding charity finance**

What key terms mean and how to question financial information.

Checks and balances:

- Managing risk without getting risk averse;
- Internal audit;
- The role of the external auditor.

3.15pm **Tea and coffee**

3.30pm **Relationships with your chief executive and chair of trustees**

- holding the chief executive to account without meddling in management;
- the chair's role and decision-making between meetings.

4.30pm **End**

## Dates

The first course takes place on 9 January 2008 and from then on it is repeated on the **first Wednesday of every month**, as follows:

- 9 January 2008
- 6 February 2008
- 5 March 2008
- 2 April 2008
- 7 May 2008
- 4 June 2008
- 3 September 2008
- 1 October 2008
- 5 November 2008
- 3 December 2008

## Venue

The training courses will be held at a central London location. A map and directions will be sent to delegates in advance of each date. Wherever possible, confirmation will be sent by email so please remember to provide your email address on the order form.

# Course leader



Dorothy Dalton is editor of *governance: essential information for effective trustees* and author of several publications on governance. She advises a number of professionally managed charities on their governance and was until recently the independent chair of the Scope Governance Working Group.

With a first in mathematics, Dorothy, a former headteacher, was chief executive of acevo, the Association of Chief Executives of Voluntary Organisations from 1992 to 2000. From 2000 to 2003 she was a non-executive director of the Inland Revenue. She is a trustee of International Students House and chairs their Governance Advisory Committee. She is chair of trustees of the Journey of a Lifetime Trust (JoLt) and until very recently

chair of trustees of Orley Farm School Trust. She is a governor of Northwood College. She is on the Advisory Boards of the Leadership Trust and the Institute of Global Ethics UK Trust. She has just completed a six-year term of office as trustee of Marie Curie Cancer Care. She founded the Network of Women Chairs and JoLt and co-founded Groundbreakers: Voluntary Sector Women Leaders.

During her spare time, Dorothy organises and leads month-long challenging expeditions for disabled and disadvantaged teenagers to remote corners of the world as well as organising and participating in fundraising expeditions such as crossing the Jordanian Desert by camel or canoeing, kayaking and white-water rafting the Zambezi between Zimbabwe and Zambia.

## Cost

Attendance at each course costs £195 plus VAT per delegate (£229.12).

We're delighted to offer current and new subscribers to *governance* magazine a £25 saving, meaning you'll pay just £170 plus VAT per trustee (£199.75).

Discounts on bulk orders are also available should you wish to send the entire board, please call 020 7819 1200 for details.

# Registration form *Please copy this form for extra delegates*

*(please tick)*

Standard rate £195 +VAT (£229.12)

**governance** subscriber rate

£170 +VAT (£199.75)

Please quote your subscriber reference

number here : \_\_\_\_\_

Mr/Mrs/Miss/Other: \_\_\_\_\_

First name: \_\_\_\_\_

Surname: \_\_\_\_\_

Job title: \_\_\_\_\_

Email: \_\_\_\_\_

Organisation: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Postcode: \_\_\_\_\_

Charity number: \_\_\_\_\_

Tel: \_\_\_\_\_

Fax: \_\_\_\_\_

I would like to attend the following course:

- 9 January 2008
- 6 February 2008
- 5 March 2008
- 2 April 2008
- 7 May 2008
- 4 June 2008
- 3 September 2008
- 1 October 2008
- 5 November 2008
- 3 December 2008

## Payment details

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**Call** 020 7819 1200

**Email** [info@charitygovernance.co.uk](mailto:info@charitygovernance.co.uk)

*We will automatically issue you with a VAT receipt.  
Payment must be received in full prior to attending.*

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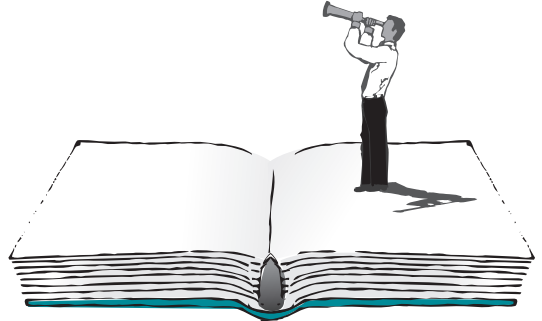
PROMO CODE: \_\_\_\_\_

# The organisers

**governance** magazine has firmly established itself as a key support in the on-going training and development of trustee boards. It contains essential information key to the success of any board and ensures trustees, chief executives and company secretaries are equipped to deal with the full range of responsibilities of governance. Regular features from experts and interviews with organisations that are operating 'best practice' complement insightful case studies and carefully thought through model documents and policies.

For more information on subscribing to **governance** magazine and/or to register for a trustee training course please contact us:

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**Call** 020 7819 1200  
**Email** [info@charitygovernance.co.uk](mailto:info@charitygovernance.co.uk)



## Training course terms and conditions

Topics and dates were confirmed at the time of publishing, however circumstances beyond the control of the organisers may necessitate alterations or cancellations. As such, Plaza Publishing Ltd reserves the right to alter or modify the advertised topics/dates if necessary. Delegates will be notified as soon as possible of any alterations.

Delegate substitutions are allowed. Refunds on cancellations will only be issued (less a 15% administration charge) up to and including 14 days prior to the event. Refunds will not be issued after this date. Confirmation of cancellations MUST be in writing and sent or faxed to Plaza Publishing at the address and number listed.