

# Trustee Introduction Training

## Workbook

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**Note:** In some parts of the UK, Scout Counties are known as Areas or Islands - and in one case it is known as a Bailiwick. But for ease of reading, this publication simply refers to Counties.

In Scotland, there is no direct equivalent to a County or Area. Instead, Scouting is organised into Districts and Regions, each with distinct responsibilities. Some County functions are the responsibility of Scottish Regions, while others lie with Scottish Districts. The focus of responsibility is outlined in Scottish variations of Policy, Organisation & Rules.

There are different charity regulations (and different charity regulators) in England, Guernsey, Isle of Man, Jersey, Northern Ireland, Scotland and Wales, as well as in each of the countries in which British Scouts Overseas operates.

# Introduction

## Who is this workbook for?

Trustee Introduction training is required for roles, as defined in [POR Chapter 16: Roles Table](#).

This workbook may be used to support individuals where, for accessibility reasons, they cannot complete this training independently using [the eLearning here](#) or complete the eLearning with someone, such as a line manager, Training Adviser, Local/County/Area/Region (Scotland) Training Manager.

## Objectives

By doing this training you will:

- Understand Trustee Boards and trusteeship in Scouts
- Understand Scouts' key policies
- Understand trustee roles and responsibilities in Scouts

Trustee Boards were previously known as Executive Committees. 'Executive Committee' and associated wording will still be visible on Compass, eLearning and the website as we move to our new way of volunteering.

## Assessment

When you have completed the learning by reading all sections of this workbook you will need to complete an assessment of your learning. The assessment is at the end of this document.

To pass and validate this module you'll need to score 100% on the assessment. But don't worry, you can re-take it as many times as you need. When you have finished the assessment you will need to have your answers checked.

Discuss your completed assessment with the person supporting you with this training. They will be able to confirm that you passed the assessment and record completion of this training.

## Lesson 1: Introduction

As a volunteer, and particularly as a charity trustee, for a Scouts charity, there are a few key responsibilities you'll need to be aware of. This training builds on the learning from Essential Information (module 1).

Haven't completed Essential Information yet? We recommend you go back and complete that one first. It'll give you more understanding on the context, structure and key information – all things that are important here, too.

The Essential Information module can be achieved by completing [the online eLearning](#) or working through a workbook. Your line manager, Training Adviser or Training Manager will be able to help you with this.

## Lesson 2: Understand Trustee Boards and trusteeship in Scouts

### Trusteeship

There are differences in charity regulations (and different charity regulators) depending on where you live in the UK. In this lesson, we'll help you understand these and detail what they are in your area.

To stay in line with legislation, all charities must have a governing body, which in Scouts we call the Scout Council. The Scout Council appoints the Trustee Board. Members of the Trustee Board are known as the **charity trustees**, and have to act as one collective in the running of their particular Scout Group, District or County.

Being a trustee means that you're legally responsible for the management and running of a charitable organisation (in this case, your local Scout Group, District or County). Trustees make decisions that will impact on people's lives and you will be making a difference to your local community, using your skills and experience to support Scouts and helping them achieve their aims.

If you think that sounds intimidating, don't worry – the responsibility is shared between everyone on the Trustee Board. You're not dealing with anything alone.

Although the Charity Commission is the regulator for England and Wales, it has a great guide on the essential trustee: what you need to know and what you need to do. We recommend all trustees [read this guide here](#) and keep it handy.

### Regional variations and official regulators

Charity regulatory bodies set out national standards and seek to ensure these standards are in place. Depending on where you live, you will need to follow the regulations of that particular body.

Each Group, District, County and Country, as well as UK HQ, are separate entities with their own Trustee Board. Some are registered with a charity regulator as outlined below. If you're not a registered charity, you **MUST NOT** use the charity number of any other charity including any Scout charity. If you're registered, you can only use the charity number specifically allocated to you.

## England and Wales

In England and Wales, Scout Groups, Districts and Counties are automatically charities in their own right.

The official charity regulator for England and Wales is called [The Charity Commission](#).

Scout Groups have to sign up with the Charity Commission for England & Wales if:

- their annual income is over £100,000
- they have a permanent endowment
- they own land or buildings
- they have a permanent endowment or own a building with an annual income that's over £5,000

[Read more about this here](#).

## Northern Ireland

In Northern Ireland, Scout Groups, Districts and Counties must register as a charity. In Ireland, the official charity regulator is [The Charity Commission for Northern Ireland](#).

You can [find out more about being a Trustee in Northern Ireland here](#).

## Scotland

In Scotland, Scout Groups, Districts and Regions (Scotland) are not automatically Charity Trustees, although they have to behave in the same way. If a Scout Group, District or Region (Scotland) wants to become a charity, they need to register individually with the Office of the Scottish Charity Regulator (OSCR). Scout Groups, Districts and Regions (Scotland) can decide whether or not to register, and not all of them do.

If you don't register though, you're unable to claim [Gift Aid](#) which is a valuable source of income, so this should be considered. (See lesson 4 below)

Charity Trustees in Scotland have four general duties. They must:

- Act in the best interests of the charity.
- Operate in a manner that stays true to the charity's purpose.
- Act with care and diligence.
- Follow the Charities and Trustee Investment (Scotland) Act 2005 and other relevant legislation.

The official charity regulator in Scotland is [the Office of the Scottish Charity Regulator \(OSCR\)](#).

There is a [Scottish Variations to POR](#) which includes more specifics for members in Scotland.

There are six duties of charity trustees in Scotland. These individual charity trustees must:

- Provide the charity regulator (OSCR) with any information it needs for the charity to be put on the Scottish Charity Register, and tell them if anything changes.
- Fill in an annual return form and provide the charity's accounts to the OSCR each year.
- Make sure that the charity keeps a record of the money it receives and the money it spends. Charities must keep a copy of their accounts for six years.
- Make sure that the charity follows OSCR's Fundraising Regulations.

- Make sure that the charity's details are on all the charity's paperwork and that information is open to the public. They must give a copy of their constitution or latest accounts to anyone who asks for them.
- Ensure compliance with all relevant legislation including the Data Protection Act.

If you don't register in Scotland, you're unable to claim Gift Aid – potentially throwing away valuable additional income.

### **Bailiwick of Guernsey**

In Guernsey, charities must comply with legislation and register with [the Guernsey Registry](#).

### **Jersey**

In Jersey the official charity regulator is the [Jersey Charity Commissioner](#), who maintains the register of Charities and helps Charity governors comply with their legal duties.

It should also be noted that Trustees are called Charity Governors.

### **Isle of Man**

The Charities Registration and Regulation Act defines those who would not be eligible for being a charity trustee.

In the Isle of Man, the official charity regulator is [HM Attorney General](#) who ensure the implementation of charity legislation.

### **British Scouting Overseas**

For [British Scouting Overseas \(BSO\)](#), the Area Scout Council is legally based in England and Wales and is a registered charity. The Council complies with charity law in England and Wales and so the official charity regulator is The Charity Commission.

See England and Wales for more detailed information.

The Districts and Groups within BSO aren't located in the UK so have to meet the law regulating charities/voluntary organisations in the country they are scouting in. They also have to have Trustee Boards though and work within POR and the BSO constitution.

## **What can stop people being able to be trustees?**

There are some things that can stop a person from becoming a trustee.

### **England, Wales & BSO**

You can't be a trustee if you, for example...

- are under 18.
- have been convicted of an offence involving dishonesty or deception (unless the conviction is regarded as spent)
- are an undischarged bankrupt.
- are subject to a Debt Relief Order.
- have been removed by the Charity Commission or by the Court in England, Wales or Scotland from being a trustee because of misconduct.
- are disqualified from being a company director.
- have failed to make payments under County Court administration orders.

There's more information in POR [Rule 13.1 Charity requirements](#).

The full list from the Charity Commission can be [found online here](#).

If you fall into any of these categories, you can't hold an ex-officio role (such as Group Scout Leader, District Commissioner or County Commissioner), and you must let your line manager know.

If, during the time you're volunteering, you become ineligible to be a trustee, you need to let the Chair know as soon as your circumstances change.

## **Scotland**

The Charities and Trustee Investment (Scotland) Act applies to Scotland.

Certain people are disqualified from continuing as a trustee, or from becoming a trustee. They're people who:

- have been convicted at any time of any offence involving deception or dishonesty, unless the conviction is regarded as spent; or are undischarged bankrupts
- have made compositions with their creditors under the Insolvency Act 1986 which have not been discharged
- have at any time been removed by the Charity Commissioners or the Office of the Scottish Charity Regulator or by any court in the United Kingdom from being a trustee because of misconduct
- are disqualified from being company directors
- have failed to make payments under county court administration orders or similar in Scotland.

This information is included in [Scottish Variations to POR](#).

You can't be a trustee in Scotland if:

- You have an unspent conviction for dishonesty or an offence under the Charities and Trustee Investment (Scotland) Act 2005.
- You're an undischarged bankrupt.
- You've been removed under either Scottish or English Law or the Courts from being a Charity Trustee.
- You've been disqualified from being a company director.

Check with the [Office of the Scottish Charity Regulator \(OSCR\)](#).

Again, if you fall into any of these categories you can't hold an ex-officio role (such as Group Scout Leader, District Commissioner or County Commissioner), and you must let your line manager know.

If, during the time you're volunteering, you become ineligible to be a trustee, you need to let the Chair know.

## **Northern Ireland**

In Northern Ireland the [Charity Commission for Northern Ireland](#) provides information on who is disqualified from being a charity trustee.

## **Bailiwick of Guernsey**

In Guernsey, the [Charities and Non Profit Organisations Law](#) provides information on charity trustees.

## **Jersey**

The [Jersey Charity Commissioner](#) can disqualify individuals from being governors (charity trustees).

## **Isle of Man**

The Charities Registration and Regulation Act defines those who would not be eligible to be a charity trustee. You can see the [Charities Registration and Regulation Act here](#).

In the Isle of Man, the official charity regulator is HM Attorney General who ensure the implementation of charity legislation.

## **Structure and Roles**

Every Group, District and County must operate as a Charity (most are formal charities, but even where they are not they have an obligation to operate as if they are). Because of this, each Group, District and County needs trustees to manage the charity.

All members of the Trustee Board are charity trustees.

The Trustee Board must meet the trusteeship requirements of the regulatory body of the country their charity operates in (the Group, District or County) and must help provide quality Scout sessions, fun and adventure, to members in their local

area.

### **Chair**

The Chair leads the Trustee Board and the recruitment for new trustees. They objectively chair the Trustee Board meetings and the Annual General Meeting, set the meeting agenda and plan its schedule. They'll see to it that any decisions made by the Trustee Board get put into action, make sure that all Trustees are properly trained and understand their own responsibilities.

### **Treasurer**

The Treasurer looks after finances and makes sure the financial documentation (such as budgets and accounts) is kept. They make sure the Annual Statement of Accounts gets done in time for the Annual General Meeting and keep track of the independent examination process. They also share details about income and spend with other trustees and draw up policies on finance and investment.

### **Trustees**

Trustees make sure the charity is well managed, risks are assessed and mitigated, buildings and equipment are in good working order, and everyone follows legal and regulatory requirements and Policy, Organisation and Rules (POR).

There are also three different categories that trustees can fall into. Simply put, these categories are based on how they came to be a part of the Trustee Board.

### **Ex-officio Trustees**

Ex officio Trustees are people who are on the Trustee Board automatically as a result of their role in Scouts.

At Group level, this is the Group Scout Leader.

At District level, this is the District Commissioner and District Youth Commissioner (except Scotland).

At County level, this is the County Commissioner, and the County Youth Commissioner (except Scotland).

### **Appointed Trustees**

Appointed Trustees are appointed by the Scout Council.

Trustee Boards will agree on an open selection process to appoint new Trustees. The Chair, Treasurer and other Trustees are all appointed at Annual General Meetings (AGMs) by the Scout Council, based on the outcome of this selection process.

### **Co-opted Trustees**

Trustee Boards can also co-opt members throughout the year. Co-opted Trustees may be chosen to do a particular task, or to bring new skills to the mix.

Co-opted Trustees are appointed for an initial period of one year (by the Trustee Board). They can stay on longer if agreed by the Trustee Board, but it's a good idea for co-opted Trustees to move onto being appointed Trustees at the next AGM.

Please note, there can't be more co-opted Trustees than appointed Trustees (excluding the Chair and Treasurer). For example, if there are four appointed Trustees on the Board (in addition to the Chair and Treasurer), there can be a maximum of four co-opted Trustees.

### **Trustee Board administration and organisation**

Trustee Boards need good administration and are collectively responsible for ensuring that this is in place.

Administration isn't, of itself, a Trustee responsibility and can be organised to suit each Trustee Board.

Some Trustee Boards might have a Secretary as an ex-officio trustee. To bring Scouts in line with charity sector good practice, the Trustee role of Secretary as the administrator will cease.

This means the tasks usually done by the Secretary (such as minute taking and meeting logistics) may be done by one person, or multiple people, for example, by a support volunteer or Leadership Team.



Read the [Moving to Trustee Boards webpage](#) to know more about changes in Trustee Board administration and organisation.

### **Right of Attendance**

Some other people have a right to attend Trustee Board meetings or can be invited to meetings for a number of reasons, usually based on their role. The District Commissioner and District Chair have right of attendance at a Group Trustee Board meeting, and the County Commissioner and County Chair have right of attendance at a District Trustee Board meeting.

### **Group Scout Leaders, District and County Commissioners**

These are the three roles that work with the Trustee Board at Group, District or County level. The Group Scout Leader, District Commissioner and County Commissioner have overall responsibility for the smooth running of the group, District or County they're responsible for. This, understandably, means co-ordinating lots of different people, systems and support. These roles work closely with their respective Chair to ensure compliance

## **Lesson 3: Understanding our key policies**

### **Our Policies**

We have **seven** key policies, documented in Policy, Organisation and Rules, which all members must stick to.

**POR – Policy, Organisation and Rules** – contains all of the rules and policies that everyone in Scouts need to follow. It includes information on our structure, activities, awards, and how to deal with any difficult situations. You can [view the POR document here](#).

POR does not cover all the legal requirements of running a charity or being a trustee. It should be read in conjunction with the appropriate charity regulator website.

Our key policies are:

- 1. Equality, diversity and inclusion policy**
- 2. Privacy and Data Protection Policy**
- 3. Religious Policy**
- 4. Safeguarding Policy**
- 5. Safety Policy**
- 6. Vetting Policy**
- 7. Youth Member Anti-Bullying Policy**

NOTE: The order of Key Policies in this section is alphabetical and infers no order of importance nor priority; they are all equal. You can [read more about the key policies here](#).

### **Equality, diversity and inclusion policy**

All members of the movement should seek to practice equality, especially in promoting equal access to Scouts for all young people. Scouts opposes all forms of prejudice and discrimination, including racism, sexism, homophobia, biphobia and transphobia.

All Scout Groups, as independent charities, have a duty to comply with relevant equalities legislation. All volunteers should make reasonable adjustments where possible to support all young people with disabilities to access Scouts.

You can read more about the [Equality, diversity and inclusion policy here](#).

### **Privacy and Data Protection Policy**

Scouts takes the protection of privacy and personal data very seriously and all adults operating within Scouts, whether at National UKHQ or within local Scout units (i.e. Scout Groups, Districts, Counties, Areas, Regions (Scotland) or Countries), must comply with data protection law which includes the EU General Data Protection Regulation 'GDPR'.

You can [read more about the Privacy and Data Protection Policy here](#).

A copy of Scouts' Data Protection Policy which provides key definitions, details of how it protects personal information and also guidance to staff, members and volunteers about how to deal with personal information they handle, can be found here.

[You can read the full Scouts Data Protection Policy here.](#)

### **Religious Policy**

The Scout Movement includes members of many different faiths and religions, as well as those with no formal religion. The policy has received the approval of the heads of the leading religious bodies in the United Kingdom. All members of the movement are encouraged to:

- make every effort to progress in the understanding and observance of the Promise to do their best to do their duty to God or to uphold Scouts' values as appropriate;
- explore their faith, beliefs and attitudes
- consider belonging to some faith or religious body;
- carry into daily practice what they profess.

You can [read more about the Religious Policy here.](#)

### **Safeguarding Policy**

It is the policy of Scouts to safeguard the welfare of all children, young people and adults at risk by protecting them from neglect and from physical, sexual and emotional harm. Scouts understands that individuals thrive in safe surroundings so we are committed to ensuring that Scouts is safe and enjoyable for everyone involved and that safeguarding practice reflects statutory responsibilities, government guidance and complies with best practice and Charity Regulators requirements.

Scouts acknowledges that some children and young people, including those disabled and those from ethnic minority communities, can be particularly vulnerable to abuse and accepts the responsibility to take reasonable and appropriate steps to ensure their welfare.

We also have a [Yellow Card Safeguarding Code of Conduct](#), known as the Yellow Card, that's there to help with safeguarding concerns. All adults must follow this and report all safeguarding concerns to the UK HQ Safeguarding Team.

Line managers must ensure that all volunteers show an understanding of – and a commitment to – the principles and procedures mapped out in the Scouts Safeguarding Policy.

You can [read more about the Safeguarding Policy here.](#)

You're going to find out much more about this in the [Safeguarding online module](#), which you'll also need to complete as part of your learning journey. Then, every three years, it'll be time to renew your knowledge.

### **Safety Policy**

Scouts recognises that life is not risk-free, and in its turn, Scouts is not risk-free. As Scouts, we believe that our members benefit most from our activities when we manage these risks to wellbeing to be as low as is reasonably practicable. Identifying and proportionately managing risk is a skill for life that we wish to kindle, develop and enhance in all of our members.

It's important that we keep all of our members safe. That's why we have a Safety Policy, setting out what all those involved in Scouts must do to take safety seriously.

- Properly assess the risk of every activity undertaken in Scouts. This assessment should be suitable and sufficient for the activity being undertaken, and follows that activities with higher risk should require more in-depth assessment.
- Provide and receive clear instructions and information, and adequate training, to ensure members are competent to undertake their task.

- Prevent accidents and cases of ill health by managing the health and safety risks in Scouts.
- Maintain safe and healthy conditions, provide and maintain plant, equipment and machinery, and ensure safe storage/use of substances.
- Review risk assessments as often as necessary when circumstances and conditions change.
- Never be afraid to change or stop an activity if risk increases.

You can [read more about the Safety Policy here](#) and [information for practical delivery here](#).

You're going to find out much more about this in the [Safety online module](#), which you'll also need to complete as part of your learning journey. Then, every three years, it'll be time to renew your knowledge.

### **Vetting Policy**

It is the policy of Scouts to check all adult volunteers to ensure that: only adults appropriate for a role are permitted to undertake responsibilities in Scouts; and that regular reviews are undertaken of adult volunteers to ensure their continued suitability.

As part of the vetting arrangements, Scouts will undertake a Personal Enquiry which involves a check made against records at Headquarters for all adult volunteers and for certain roles a Criminal Record Disclosure Check. For foreign nationals or British Overseas Territory citizens operating abroad in British Scouting Overseas and Overseas Branches, checks must be made according to arrangements authorised by the Head of Safeguarding at Headquarters.

You can read more about the [Vetting Policy here](#).

### **Youth Member Anti-Bullying Policy**

'Children have the right to protection from all forms of violence (physical or mental). They must be kept safe from harm and they must be given proper care by those looking after them.' [The United Nations Convention on the Rights of the Child, Article 19]

Scouts is committed to this ethos and seeks to ensure, as far as is reasonably practicable, the prevention of all forms of bullying among Members. To this end, all Scouts activities should have in place rigorous anti-bullying strategies.

It is the responsibility of all adults in Scouts to help develop a caring and supportive atmosphere, where bullying in any form is unacceptable.

You can read more about the [Youth Member Anti-Bullying Policy here](#).

There is also a Volunteer Anti-Bullying and Harassment Policy and you can [find out more about this here](#).

# Lesson 4: Understand the trustee roles and responsibilities in Scouts

## Key responsibilities of the charity trustees in Scouts

### Scout Group

Group trustees must act collectively, and in the best interests of its members to:

- Comply with the Policy, Organisation and Rules of Scouts.
- Make sure buildings and equipment owned by and/or used by the Group are working well.
- Look after Group finances.
- Have the right insurance for people, property and equipment.
- Make sure there are sufficient resources for Scouts to operate. This includes, but is not limited to supporting recruitment, other adult support, and fundraising activities.
- Promote and support the development of Scouts in the local area.
- Follow [POR](#), [key policies](#) (including [safety](#), [safeguarding](#), [data protection](#), and [equality, diversity and inclusion](#)), and charity regulations.
- Make sure that a positive image of Scouts exists in the local community.
- Appoint and manage the operation of any Trustee Board sub-teams, including appointing a sub-team leader to lead the sub-teams.
- Make sure that young people are meaningfully involved in decision making at all levels within the Group.
- The opening, closure and amalgamation of Sections in the Group as necessary.
- Appoint Administrators, Advisers, and Co-opted trustees.
- Approve the Annual Report and Annual Accounts after their examination by an appropriate auditor, independent examiner or scrutineer.
- Present the Annual Report and Annual Accounts to the Scout Council at the Annual General Meeting; file a copy with the District Trustee Board; and if a registered charity, to the appropriate charity regulator if the regulator's rules require it.
- Maintain confidentiality with regard to appropriate Trustee Board business.
- Where staff are employed, act as a responsible employer in accordance with Scouts' values and relevant legislation.
- Make sure line management responsibilities for employed staff are clearly established and communicated.

You can [read more in POR the Constitution of the Scout Group](#).

## Scout District

District trustees must act collectively, and in the best interests of its members to:

- Comply with the Policy, Organisation and Rules of Scouts.
- Make sure buildings and equipment owned by and/or used by the District are working well.
- Look after the District finances.
- Have the right insurance for people, property and equipment.
- Make sure there are sufficient resources for Scouts to operate. This includes, but is not limited to supporting recruitment, other adult support, and fundraising activities.
- Promote and support the development of Scouts in the local area.
- Follow [POR](#), [key policies](#) (including [safety](#), [safeguarding](#), [data protection](#), and [equality, diversity and inclusion](#)), and charity regulations.
- Make sure that a positive image of Scouts exists in the local community.
- Appoint and manage the operation of any Trustee Board sub-teams, including appointing a sub-team leader to lead the sub-teams.
- Make sure that young people are meaningfully involved in decision making at all levels within the District.
- The opening, closure and amalgamation of Groups, Explorer Scout Units, Scout Network and Scout Active Support Units in the District as necessary.
- Appoint and manage the operation of an Appointments Advisory Committee, including appointing an Appointments Committee Chair to lead it.
- Supervising the administration of Groups, particularly in relation to finance and the trusteeship of property.
- Appoint Administrators, Advisers, and Co-opted trustees.
- Approve the Annual Report and Annual Accounts after their examination by an appropriate auditor, independent examiner or scrutineer.
- Present the Annual Report and Annual Accounts to the Scout Council at the Annual General Meeting; file a copy with the County Trustee Board; and if a registered charity, to submit them to the appropriate charity regulator.
- Maintain confidentiality with regard to appropriate Trustee Board business.
- Where staff are employed, act as a responsible employer in accordance with Scouting's values and relevant legislation.
- Make sure line management responsibilities for employed staff are clearly established and communicated.

You can [read more in POR the Constitution of the Scout District](#).

## Scout County

County trustees must act collectively, and in the best interests of its members to:

- Comply with the Policy, Organisation and Rules of Scouts.
- Make sure buildings and equipment owned by and/or used by the County are working well.
- Look after the County finances.
- Have the right insurance for people, property and equipment.
- Make sure there are sufficient resources for Scouts to operate. This includes, but is not limited to supporting recruitment, other adult support, and fundraising activities.
- Promote and support the development of Scouts in the local area.
- Follow [POR](#), [key policies](#) (including [safety](#), [safeguarding](#), [data protection](#), and [equality, diversity and inclusion](#)), and charity regulations.
- Make sure that a positive image of Scouts exists in the local community.
- Appoint and manage the operation of any Trustee Board sub-teams, including appointing a Chair to lead the sub-teams.
- Make sure that young people are meaningfully involved in decision making at all levels within the County.
- The opening, closure and amalgamation of Districts, the County Scout Network and Scout Active Support Units in the County as necessary.
- Appoint and manage the operation of any Trustee Board sub-teams, including appointing a sub-team leader to lead the sub-teams.
- Appoint Administrators, Advisers, and Co-opted trustees
- Approve the Annual Report and Annual Accounts after their examination by an appropriate auditor, independent examiner or scrutineer.
- Present the Annual Report and Annual Accounts to the Scout Council at the Annual General Meeting; file a copy with National Headquarters and if a registered charity, to submit them to the appropriate charity regulator.
- Maintain confidentiality with regard to appropriate Trustee Board business.
- Where staff are employed, act as a responsible employer in accordance with Scouts' values and relevant legislation.
- Make sure line management responsibilities for employed staff are clearly established and communicated.

You can [read more in POR the Constitution of the Scout County](#).

## Let's look at a few of these responsibilities in a bit more detail.

### Safety

It's the responsibility of all those involved in Scouts to, as much as is reasonably practicable, to make sure that all activities are led safely, without risk to the health of our young people and volunteers.

The Safety Policy sets out our rules that all those involved in Scouts should comply with. The Safety Policy [can be found here](#).

These are:

- Properly assessing the risk of every activity undertaken as part of Scouts. This assessment should be suitable and sufficient for the activity in question. Naturally, activities with higher risk should have a more in-depth assessment.
- Providing and receiving clear instructions and information, and adequate training, so that all members can properly tackle their task.
- Preventing accidents and cases of ill health by managing any health and safety risks in Scouts.
- Maintaining safe and healthy conditions, especially when it comes to equipment, machinery, and the safe storage/use of substances.
- Reviewing risk assessments as often as necessary when things inevitably change.
- Never being afraid to change or stop an activity if risk increases.

It's the job of every Trustee Board in Scouts to make sure it's happy that this policy is being put into effective use, and to engage and consult with members on the health and safety conditions within the Scouts. It should be on the agenda at all meetings.

### Property and equipment

Scout Groups, Explorer Scout Units and Scout Networks have to be properly accommodated and equipped. That way, they can offer the best adventures possible.

The responsible body for making sure that every premises or location operated and/or used by Scouts (that's all buildings/campsites/Headquarters) is the relevant Trustee Board. This means the Trustee Board also becomes the Managing Controller of the premises, if owned by Scouts.

Trustees don't have to conduct the operational tasks themselves (such as premises management or equipment maintenance), but they're responsible for making sure that premises and equipment are safe. They can work together with other support volunteers or Leadership Teams to make sure these tasks get done. These tasks could include, for example:

- asbestos management
- electrical testing
- water quality testing
- fire safety and evacuation
- gas boilers and cookers
- general maintenance of equipment and buildings
- proper use of activity equipment
- access to the property

If Scouts use a premises that isn't Scouts owned, the Trustee Board does still need to make sure that the above checks have been completed and are happy the premises are safe. Need help with this? [More guidance is available here.](#)

Advice on carrying out risk assessments, communicating controls with the users of the premises and a safety checklist [can be found here.](#)

The Trustee Board could appoint a support volunteer or sub-team to look after the care and control of the equipment.

They should work closely with the Treasurer, who's responsible for the inventory and insurance of the equipment. Having someone to deal with the day-to-day upkeep, repair and booking in and out of equipment will really help to make sure equipment is looked after and ready, whenever needed.

## **Insurance**

Every Scout Group, District and County must maintain adequate insurance cover, to be reviewed annually, in light of risks such as:

- property and equipment, owned, hired or borrowed, including the risk of loss or damage to equipment whilst on the move, at a camp, or on an expedition
- minibuses and other motor vehicles, including passenger risk, in the British Isles or abroad
- marine and boating risks
- aviation and air activity risks
- travel
- employers' liability for people a Scout Group, District and County may employ

Unity (Scout Insurance Services) is the official insurance broker of Scouts and is one company that can arrange insurance cover that meets the standards described above.

Scouts provides protection for liability claims (Public Liability Insurance) made against members or groups and medical expenses (Personal Accident and Medical Insurance) that are a result of a Scouts activity. It also provides protection for all Scout Trustee Boards and trustees (Trustee Indemnity), as long as they acted correctly.

You can [find out more about Unity insurance services here.](#)

There's a handy chapter in Policy, Organisation and Rules on Insurance responsibilities which [can be found here.](#)

## **Finances**

Scouts need funds, otherwise we wouldn't be able to provide the wide variety of activities and events, or purchase equipment and badges (and so on).

One of the main jobs of the Trustee Board is to make sure that there's enough funding for Scouts to properly operate.

Gift Aid is a great way to grow income for Scouts. You can claim back 25p every time an individual donates £1 and this includes membership fees. This is available for those in England, Wales, Scotland and Northern Ireland. You can [find more information on Gift Aid here.](#)

If your charity owns buildings and/or land, this could be rented out to generate income. You'd need to consider the way this is done and the legal implications of lettings and extra insurance for example.

The proper financial planning and budgetary control of a Group/District/County lies with the Trustee Board.

A statement of accounts must be prepared annually and be put under the microscope, independently examined or audited. Following approval by the trustees they are presented to the Scout Council at the Annual General Meeting,



before being filed with the Charity Commission.

The Treasurer will lead this area of responsibility.

You'll find more information on managing finances on the [Tools for Trustee Boards webpage](#).

### **Incident reporting**

Sometimes things will go wrong. Trustees have responsibility to report serious incidents to their regulator (Charity Commission, OSCR etc).

A serious incident is an unfortunate event, whether actual or alleged, which results in or risks significant:

- harm to beneficiaries, staff, volunteers or others who come into contact with your charity through its work
- loss of charity's money or assets
- damage to charity's property
- harm to charity's work or reputation

For the purposes of this guidance, 'significant' is in the context of your charity, taking account of its staff, operations, finances and/or reputation. For example a significant loss to a Scout Group may be different from a Scout County. If in doubt report it!

UK Headquarters will report serious incidents relating to safeguarding and safety. Other serious incident reporting is down to the local trustees. More detailed guidance can be found via the following links.

### **England & Wales**

[View incident reporting guidance for England & Wales.](#)

### **Scotland**

[View incident reporting guidance for Scotland.](#)

### **Northern Ireland**

[View incident reporting guidance for Northern Ireland.](#)

### **Record keeping – complaints**

Each Trustee Board (at Group, District and County levels) is responsible for maintaining the records of the completed complaints file, upon conclusion of the complaint.

This should be stored in line with the Scouts Data Protection Policy and following guidance set out in [the Complaints and Handling personal data guide](#).

### **Youth Shaped Scouts**

Every week, Scouts give almost half a million people 4-25 year olds the skills they need for school, the job interview, the important speech, the tricky challenge: the skills they need for life. It's important then, that young people are at the centre of the conversation when it comes to decision-making in the Scout Movement.

Where possible, Group, County and District Trustee Board should have, as full voting members, at least two young people between the age of 18 and 25 years old.

Being a part of the Trustee Board is just one of the many ways in which young people can shape Scouts, and it's vital they're supported in doing this.

A person under the age of 18 cannot act as a charity trustee. However, they can still have a full role on any Trustee Board sub- team and attend Trustee Board meetings (with no formal vote).

### **Annual General Meeting (AGM)**

Each year, all Scout Councils, are required to hold an Annual General Meeting (AGM), within six months of the end of the financial year.

It's important that all trustees attend, along with as many members as possible from the Scout Group, District or County Scout Council. Many of the Trustee Board's most important tasks can be traced back to the Annual General Meeting.

### **What happens at an AGM?**

The Annual General Meeting is where the Scout Council receives a report and accounts from the Trustees that they appointed at the previous AGM, and appoints the Trustees that will form the Trustee Board and other key roles for the next year.

[You'll find more information on the Annual General Meeting webpage.](#)

## **Now take the assessment**

Now it's time to put your knowledge to the test. You'll need 100% to pass, but don't worry, you can always re-take the assessment if you don't get it all the first time around.

# Assessment

## Trustee Introduction Learning Assessment

### Trusteeship

Question 1: Select which statement on who are charity trustees is true

- A. Only the Chair and Treasurer are trustees
- B. All members of the Trustee Board (for a registered charity)
- C. Only Ex Officio and Appointed Trustees are trustees
- D. Only Co-opted and Appointed Trustees are trustees

### Trustee roles

Question 2: Match the statement on the left with the correct trustee role on the right.

	Number	
A: Leads the Trustee Board, plans meeting's agenda and ensures decisions are put into action.		1. Treasurer
B: Creates the annual statement of accounts and ensures they go through the exam process.		2. Appointed trustees
C: People who are on the Trustee Board automatically due to their role in Scouts		3. Chair
D: Trustees appointed by the Scout Council at the AGM.		4. Co-opted trustees
E: Trustees who are chosen to do a particular task or bring new skills throughout the year.		5. Ex officio trustees

### Policies

Question 3: Select the policy that this statement is true for.

**'Scouts opposes all forms of prejudice and discrimination, including racism, sexism, homophobia, biphobia and transphobia.'**

- A. Religious Policy
- B. Equality, diversity and inclusion policy
- C. Safety Policy
- D. Vetting Policy
- E. Safeguarding Policy
- F. Youth Member Anti-Bullying Policy
- G. Privacy and Data Protection Policy

Question 4: Select the policy that this statement is true for.

**'As Scouts, we believe that our members benefit most from our activities when we manage these risks to wellbeing to be as low as is reasonably practicable.'**

- A. Religious Policy
- B. Equality, diversity and inclusion policy
- C. Safety Policy
- D. Vetting Policy
- E. Safeguarding Policy
- F. Youth Member Anti-Bullying Policy
- G. Privacy and Data Protection Policy

Question 5: Select the policy that this statement is true for.

**'Scouts acknowledges the duty of care to safeguard and promote the welfare of children and young people.'**

- A. Religious Policy
- B. Equality, diversity and inclusion policy
- C. Safety Policy
- D. Vetting Policy
- E. Safeguarding Policy
- F. Youth Member Anti-Bullying Policy
- G. Privacy and Data Protection Policy

Question 6: Select the policy that this statement is true for.

**'Scouts must comply with data protection law which includes the EU General Data Protection Regulation 'GDPR'.'**

- A. Religious Policy
- B. Equality, diversity and inclusion policy
- C. Safety Policy
- D. Vetting Policy
- E. Safeguarding Policy
- F. Youth Member Anti-Bullying Policy
- G. Privacy and Data Protection Policy

## Safety

Question 7: Trustees don't have to conduct the operational tasks themselves (such as premises management or equipment maintenance), but they're responsible for making sure that premises and equipment are safe. Select the 7 options that would fall under this responsibility:

Option	Tick if correct
asbestos management	
organising the craft cupboard	
electrical testing	
water quality testing	
planting daffodils in the Scout hall flower beds	
gas boilers and cooker maintenance	
general maintenance of equipment and buildings	
use of activity equipment	
washing up after the Scouts have had a cooking evening	
fire safety and evacuation	

## Insurance

Question 8: Select all that trustees are responsible for making sure are adequately insured:

Option	Tick if correct
property and equipment, owned, hired or borrowed, including the risk of loss or damage to equipment while on the move, at a camp, or on an expedition	
minibuses and other motor vehicles, including passenger risk, in the British Isles or abroad	
marine and boating risks	
aviation and air activity risks	
travel	
employers' liability for people a Scout Group, District and County may employ	

## Finance

Question 9: Fill in the gaps using the words in the box.

annually	Council	audited	accounts
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A statement of \_\_\_\_\_ must be prepared \_\_\_\_\_ and be put under the microscope, independently examined or \_\_\_\_\_. Following approval by the trustees they are presented to the Scout \_\_\_\_\_.

Question 10: What has to happen within six months of the end of the financial year?

- A. Quarterly Review Meeting
- B. Annual Review Meeting
- C. Annual General Meeting

**When you have completed the assessment, share your answers with the person supporting you with your training.**