

Opportunity Profile: Trustee of the CRA

Being a trustee of CRA is both a privilege and a pleasure. It offers the opportunity to work closely with colleagues from other Institutions, sectors and backgrounds. From a personal development aspect, it offers access to diverse thinking from a broad range of different organisations involved in this area of work. Everyone is onside and there is, as such, a dearth of politics.

It won't surprise you that the role of trustee is concerned with ensuring the organisation is configured to meet its strategic objectives. So making sure the organisation survives and thrives is one aspect, but a second equally important aspect is ensuring it can fulfil its [purpose](#). The Board of Trustees acts as the final decision maker and arbiter in the Company's direction.

What is involved?

1. Attending virtual and live meetings.
2. Reading the paperwork and contributing ideas to the debate (verbally, in writing and by other means).
3. Joining a working/sub group of the Trustees. (Optional)
4. Engaging with and acting as a conduit for members.
5. Acting as ambassadors, accessing other networks and extending the links of the CRA.
6. Seeking opportunities to further the CRA's [mission](#).
7. The bottom line - some legal scary stuff from the [Charity Commission](#):

Trustees must ensure that the CRA charity complies with:

- Charity law, e.g. that the charity prepares reports on its work, and submits Annual Returns and accounts as required by law.
- The requirements or rules, and the charitable purpose and objects, set out in the charity's [own governing document](#). All trustees should have a copy of this document, and be familiar with it. Trustees must:
- Ensure that the charity is and will remain solvent; this means that you need to keep yourself informed of the charity's activities and financial position.
- Use charitable funds and assets wisely, and only to further the purposes and interests of the charity.
- Avoid undertaking activities that might place the charity's property, funds, assets or reputation at undue risk.

- Take special care when investing the funds of the charity, or borrowing funds for the charity to use.
- Exercise reasonable care and skill as trustees, using personal knowledge and experience to ensure that the charity is well-run and efficient.
- Consider getting external professional advice on all matters where there may be material risk to the charity, or where the trustees may be in breach of their duties.
- Comply with the requirements of other legislation and other regulators (if any) which govern the activities of the charity.
- (Act with integrity, and avoid any personal conflicts of interest or misuse of charity funds or assets.

How CRA Trustees have, in practical terms, interpreted their role:

1. Making sure that the CRA is on a strategic track to deliver its mission and vision. (We review this periodically and a lot!! In short we believe it centres around thought-leadership, reaching out to new partners and the development of effective practice).
2. Monitoring progress against the CRA's strategic objectives.
3. Ensuring the CRA succeeds financially.
4. Ensuring the CRA's business process excel.
5. Ensuring the CRA satisfies its membership (i.e. customers).
6. Ensuring the CRA continues to support its people and be a learning organisation.

Opportunity Profile: Chair of Trustees, CRA

What does the Chair of Trustees do? A good question! Firstly, some reassurance, it doesn't take a huge amount time, honest. Secondly, I have listed below the key activities I have undertaken in the first 12 months of my tenure.

What is involved?

- 1) Conferring with the chief executive and agree, agenda, content, format and conduct of trustee meetings.
- 2) Chairing the meetings of the trustees.
- 3) Agreeing the minutes and actions following meetings

- 4) Taking Chair's action on Trustees' matters between meeting
- 5) As 1 to 4 above, similarly prepare a Chair's report for the AGM and chair the AGM session.
- 6) Providing a regular communication channel between the Trustees and the Chief Executive and his team.
- 7) Providing interim strategic level advice, guidance and sanction for the Chief Executive between meetings.
- 8) Attending a small number of strategic meetings when required in support of the executive (e.g. with the HEAcademy)
- 9) Providing an HR line management function for the Chief Executive (negotiation with Chief Executive's employer, review, appraisal and personal development planning)
- 10) Undertaking specific project work when and if appropriate (optional and a function of the chair's interest and time commitments).
- 11) Welcoming and supporting new Trustees joining the CRA community.
- 12) Attending to all the other duties of a Trustee.

Paul Jackson: February 2012