

General Welfare Requirement: Organisation

Providers must plan and organise their systems to ensure that every child receives an enjoyable and challenging learning and development experience that is tailored to meet their individual needs.

Trustees

4.12 Introductory Trustee Guide

Welcome

Thank you for choosing to volunteer as a trustee of St Joseph's Pre-school. We extend a warm welcome and hope that your volunteering with the charity will be enjoyable, fulfilling and rewarding.

Our trustees are extremely important to us. The charity thrives thanks to the dedication of the many different people who work with us – our volunteers, our family members and our employees. As a volunteer, we value the contribution of your time and skills, as they are an essential ingredient to our continued success.

Volunteering as a trustee of St Joseph's Pre-school can also have many rewards and benefits. It offers you the opportunity to become more practically involved in the care and education of your child; and it is widely recognised that when parents play an active role, their child can achieve more. You will also have a chance to update existing skills and learn new ones. This can have valuable long-term personal/professional benefits such as when applying for jobs or undertaking further training.

We are pleased to introduce this trustee guide to provide you with some valuable information as part of your induction process.

A brief history of the charity

St Joseph's Pre-school, formerly Hill Tots Playgroup, was established, with the backing of the Head of St Joseph's Catholic Primary School, on 19 March 2001. It was originally based in Nympsfield Village Hall, moved to St Joseph's Catholic Primary School's Out of School club in December 2006, then in 2009 transferred to the Leigh Building where it now resides.

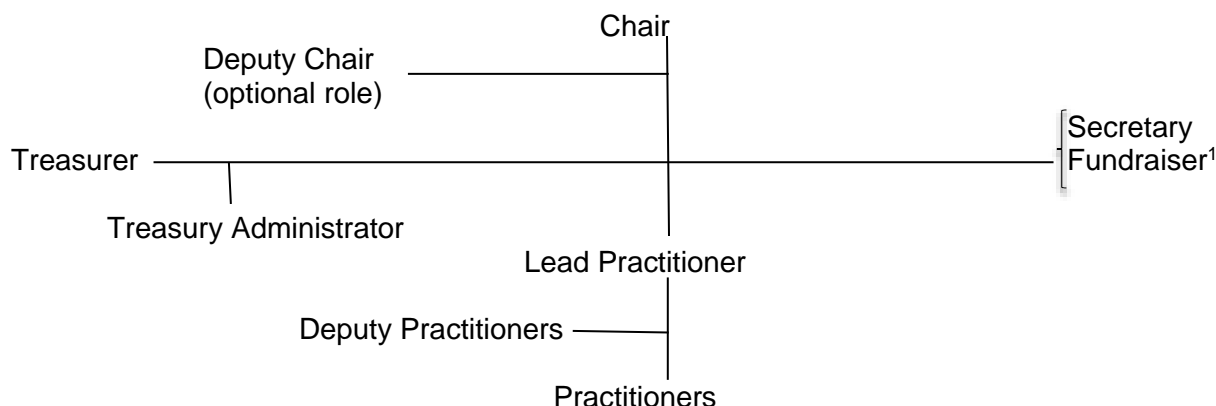
Our aim is to advance education for the public benefit by the provision of a pre-school for children aged 2 to 4 living in the Stroud Valley. To achieve this and the objects of the charity, we undertake the following activities by:

- providing children's places for pre-school activities;
- managing, supporting, developing and paying staff;
- ensuring applications of government nursery grants, fundraising and researching other grant initiatives;
- ensuring Ofsted, Gloucestershire County Council and 'Free for 3s and 4s compliance;
- involving community and parents in group activities.

Our mission statement is:

- for children to feel safe and happy;
- to learn and develop through play in a rich and warming environment;
- to be kind, caring and form secure friendships.

The St Joseph's Pre-school's charity structure is:



The charity aims to involve family members by inviting them to the Annual General Meeting and to help in fundraising activities. St Joseph's Pre-school's main fundraising activity is running a Tombola. This is primarily at St Joseph's Catholic Primary School's PTA events. In addition, each half-term the Pre-school holds a Cake Raffle. Volunteer bakers are parents and the raffle is advertised through the Pre-school and School Facebook pages (each individual year group) in the week leading up to the draw (tickets purchased via email or cash).

Appointing trustees

St Joseph's Pre-school is committed to engaging a diverse committee of trustees, which reflects the society in which we operate. The trustees of St Joseph's Pre-school are elected each year at the charity's Annual General Meeting (AGM), or may be co-opted onto the committee at the invitation of the trustees, following the AGM. Individuals over the age of 18 who are a family member with the charity are eligible to be elected as trustees.

A few individuals may be disqualified from acting as a trustee of a charity; such as those that have an unspent conviction for an offence involving deception or dishonesty, or are bankrupt (unless they are discharged). If you are unsure if you are eligible, you can contact the Charity Commission for further guidance (www.gov.uk/government/organisations/charity-commission).

The trustee role is also subject to suitable checks by Ofsted (www.gov.uk/government/organisations/ofsted), which includes a Disclosures and Barring Service check. Having a criminal record will not necessarily bar you from volunteering with us. This will depend on the circumstances and background to the offence(s) disclosed.

The role of the trustees

The trustees, often referred to as the Committee, are jointly responsible for the effective running of St Joseph's Pre-school and making decisions regarding the management of the charity in order to achieve its aims. The trustees have an overriding duty to act lawfully and in the best interests of the charity and its beneficiaries – the children – working together to enable the Pre-school to carry out its purposes.

¹ The fundraising role will be undertaken by the Secretary if an individual does not come forward for this specific role.

You must also avoid putting yourself in a position where your duty to the Pre-school conflicts with your personal interests or loyalty to any other person or body. If it is envisaged that there is a conflict of interest, then you will be asked to read policy 2.7 Conflict of Interest and sign the associated form.

The Group Constitution is the legal governing document for our charity. It outlines the rules that the trustees must follow to run the charity properly and legally. A copy will be made available to you as part of your induction.

Our trustees may have various roles and duties. The officers (Chair, Treasurer and Secretary) are usually given certain key tasks to perform to help ensure they are carried out effectively. However, the trustees are a team and must support one another so that no one person has too much work or responsibility. An outline of the trustee's responsibilities is provided with the attached "Role of Committee Members" and should be updated as necessary to reflect the agreed allocation of tasks across the Committee. Certain administrative tasks may be delegated to employees of the charity, where appropriate. However, as the trustees, you remain responsible for directing and managing their work.

We recommend that you read the Charity Commission's guidance (CC3) entitled "The Essential Trustee: What you need to know, what you need to do"

Trustee induction

As a volunteer you will not be issued with a contract of employment. There will be an expectation that you will meet the role's requirements – as a charity trustee, an employer and a registered childcare provider. To ensure that this happens, you will be given a realistic preview of what to expect from the role before you start volunteering, and provided with the following information during your induction process:

- relevant Committee Member role description
- the charity's Group Constitution
- the latest Trustees' annual report (if applicable) and accounts
- minutes of the last Committee meeting
- the *Early Years Foundation Stage* (via hyperlink)
- [Ofsted inspection report](#) February 2023 (via hyperlink)
- Ofsted registration document – see notice board in Pre-school reception
- PATA login – to look at training and business pack ("Officer" roles only, ie Chair, Treasurer and Secretary)
- DfE [Guidance](#): Keeping Children Safe in Education (latest version)² (via hyperlink)

Your first task as a trustee is to use the available information to make yourself aware of your various responsibilities. A good place to start is to familiarise yourself with the charity's Group Constitution, which will answer many of the common queries about how the charity operates, and the *Early Years Foundation Stage*, which outlines the requirements for the childcare provision.

² Part 1 and Annex A

It is also important to have a good handover. If available, previous trustees will give you clear direction or training on the charity's systems and procedures and may be invited to initial meetings to provide advice and support.

Managing the finances

An important part of your role as a trustee will be to ensure that the charity's finance comply with relevant financial requirements and are managed in accordance with the Group Constitution. This involves keeping accurate accounting records, preparing the accounts at the end of the financial year and, in some cases, having them audited or examined by an independent person to ensure the money is appropriately accounted for. The accounts must be accompanied by an annual report, prepared by the trustees, describing the activities of the charity in the year and providing information about the management and operations of the charity.

Managing employees

St Joseph's Pre-school employs a team of qualified and experienced early years practitioners to manage the day to day running of the childcare provision. It also has a dedicated Treasury Administrator who supports the Treasurer in the first part, but also allocates 2 hours per week to assist the Chair in his/her role, and works closely with the Lead Practitioner.

As a trustee of St Joseph's Pre-school, you will be one of the employers of the staff who work for the charity and must comply with the laws on employment. These will involve you fulfilling responsibilities to your employees (by respecting their legal rights) and to the Government (by operating PAYE and other systems). You will also need to work together with your fellow trustees to supervise the work of your employees and to put appropriate systems and controls in place to ensure that tasks are carried out correctly and meet legal requirements.

Charity Commission registration

St Joseph's Pre-school is registered with the Charity Commission (registered number 1089094), which is the body that regulates charities in England and Wales. Trustees must complete an annual return for the Charity Commission each year within 10 months of the charity's financial year-end, to ensure they are kept up-to-date with any changes to the charity or its trustees. A copy of the charity's annual report and accounts must also be submitted to the Charity Commission with the annual return, if the charity's income exceeds £25,000 per year.

Ofsted and the Early Years Foundation Stage

St Joseph's Pre-school is registered as a childcare provider with Ofsted (registered number EY299203). Ofsted inspect and regulate the quality and standards of care and education in childcare settings against the outcomes and requirements of the *Early Years Foundation Stage*. The *Early Years Foundation Stage* is a mandatory framework for all registered childcare providers and schools caring for children from birth to five years. It aims to ensure that all childcare services provide a safe and secure environment for children and support children's learning and development through carefully planning play activities that are fun and appropriate to their needs.

The trustees of our charity jointly form the 'registered person' with Ofsted and have overall responsibility for ensuring the childcare provision complies with the requirements of Ofsted registration and the *Early Years Foundation Stage*. As part of your induction you will need to ensure you are aware of these requirements. For the most part, the requirements will be delivered through the effective leadership of the staff at the setting; particularly the Lead Practitioner, who will take charge of the day-to-day running of the provision.

Whenever there is a change to the charity trustees who make up the 'registered person', the Chair (Ofsted's "Nominate person"³) must email Ofsted details within 14 days of the change. Ofsted will carry out a number of checks to determine that the trustees are suitable to provide childcare; including a Disclosures and Barring Service check. Each new trustee will need to complete a declaration and consent form (EY2) online via the Government Gateway Portal, and to allow Ofsted to carry out an enhance Disclosures and Barring Service (DBS) check complete information, online, via Capita Recruitment. All trustees have shared responsibility for the childcare provision.

Safeguarding children⁴

St Joseph's Pre-school is committed to ensuring that children have a safe, positive environment where they can learn and develop. It is the duty of the trustees to ensure that all staff and volunteers are also committed to children's well-being and safety; are clear about their responsibilities to safeguard and promote children's welfare; know the procedures for highlighting any concerns; and have appropriate guidance and training to undertake their roles. Please read the charity's safeguarding and child protection policy and procedure.

All staff and trustees undertake a DBS check. Evidence of this and staff qualifications is kept in St Joseph's Pre-school's Single Central Record, accessible only by the Chair and Ofsted. All committee members are required to have completed Safeguarding Training (Level 1).

Health and safety⁵

The charity regards the management of health and safety as an integral part of its activities and a management priority. Please refer to the charity's health and safety policies and procedures.

Confidentiality and data protection⁶

As a trustee of the charity you will come into contact with a variety of confidential personal information about staff, children, families and other volunteers. You must ensure that this information is treated with absolute confidentiality at all times and that you do not share personal information unless you are legally required to, or have obtained consent from the individual whom it regards. Otherwise you could breach the General Data Protection Regulations 2018 and the Data Protection Act 2018, which provides strict rules in this area.

Upon taking up your role as trustee, you will be required to read and sign the Committee Confidentiality Agreement contained within the Pre-school's Confidentiality Policy (No 1.4). Together with confirmation that they have read 1.11.1 Acceptable Use of Technology, by signing the Agreement in Appendix 1.

Expenses

Trustees are entitled to be reimbursed for any reasonable expenses they incur that are necessary to enable them to carry out their trustees duties for St Joseph's Pre-school. The expenditure will only be approved by the Committee and reimbursed if it has been incurred exclusively for the charity's work whilst carrying out a trustee role.

³ Acts as the main contact between St Joseph's Pre-school and Ofsted

⁴ Policy 1.2 Safeguarding children and child protection

⁵ Policy 3.2 Health and Safety general standards

⁶ Policies 1.4 Confidentiality; 1.11.1 Acceptable Use of Technology; 5.4 Data Protection; 5.5 Data Subject Access Requests; 5.6 Data Breaches

Liability

Liabilities can occur for trustees if they commit a criminal offence; do not comply with statutory duties; fail to follow the rules of the charity's governing document; breach the terms of an agreement or contract; or carry out, or authorise, a wrongful act.

St Joseph's Pre-school is an unincorporated charity. This means that the Committee of trustees may be liable for actions they take in the charity's name, particularly if they have acted wrongly or if the charity does not have sufficient assets to meet a liability. However, if the trustees act lawfully and in accordance with the charity's Group Constitution, this personal liability is rare. It is also the charity's policy to put an appropriate level of reserves and insurance cover in place to safeguard against this situation.

Further information

*PATA*⁷

The trustees of charities running to the PATA Group Constitution (PATA membership number D 087PSV) can contact PATA for advice, support and a variety of resources:

T: 01452 541244

E: info@pataglos.org.uk

W: www.pataglos.org.uk

Charity Commission

The Charity Commission Website (www.gov.uk/government/organisations/charity-commission) provides lots of useful information and resources including (but not limited to):

- Charity trustee: What's involved ([CC3a](#))
- The essential trustee: what you need to know, what you need to do ([CC3](#))
- Conflicts of interest: a guide for charity trustees ([CC29](#))
- Prepare a charity trustees' annual [report](#)
- Prepare a charity annual [return](#)

Associated Policies and Procedures

- 1.4 Confidentiality
- 1.11.1 Acceptable Use of Technology
- 2.7 Conflict of Interest
- 4.13 Role of Committee Members

⁷ Originally the Playgroup and Toddlers Association set up in the 1960s. It is the largest voluntary sector provider of support to early years childcare and education in Gloucestershire

Version Number	Author	Purpose of Change	Date
1.0	K Coupe	Created and approved by Committee	Sept 2015
2.0	Committee	Reviewed	Oct 2016
3.0	K Coupe	Reviewed, updated and version controlled	10 July 2019 AGM
4.0	K Coupe & N Powers	Updated with regards to 2 hours/week to assist Chair in role, inclusion of hyperlinks to documents, and other tweaks	06 August 2020 Cttee Mtg
5.0	K Coupe	Updated as follows: <ul style="list-style-type: none"> • date of latest Ofsted inspection; • inclusion of “associated policies and procedures” section as per EY Safeguarding Audit 2023 s175/157; • requirement for Committee members to complete Safeguarding Training (Level 1). 	18 July 2023 Chair (A Hitchings)
6.0	K Coupe	Reviewed and updated to reflect current practice	5 May 2025 Committee Member (B Wheeler)