

# Charminster Pre-School Trustee Induction Guide



## Welcome

Thank you for choosing to volunteer as a trustee of Charminster 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 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 Charminster 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 children can achieve more. You will also have a chance to update existing skills and learn new ones. This can have valuable long-term benefits when applying for jobs or undertaking further training.

We are pleased to introduce this trustee guide to provide you with some valuable information: if you are considering volunteering as a trustee for the charity, or as part of your induction process.

## A brief history of the charity

Charminster Pre-school is a well-established charity run Pre-school which has been operating since 1971. Located within the grounds of St Mary's First School in a purpose-built log cabin, the light and airy play room has under floor heating and a wealth of resources. The garden is largely maintained by staff and volunteers via the popular Pre-School gardening club. The Pre-school also has access to a copse on the grounds of St Mary's First School and runs twice weekly forest school sessions. We have close links with St Mary's First School, Charminster.

Preschool Leader and Designated safeguarding lead: Rachel Shaw (Early Years Teacher, Level 6)

Deputy Preschool Leader and safeguarding second: Sally Porter (Level 3 and forest school leader)

Early Years Practitioners: Sioux Quinn-Smith (Level 5 and forest school leader)

Catarina Hart (Level 3)

Hannah Hewish (Level 3)

Jodie Thorpe (training at level 3)

Jayne Martin (Level 3)

Becky Hewish

Bank Staff: Louise Fisk

Administrator: Vanessa Thomas

The Preschool Leader is a committee member. The administrator, Deputy Preschool Leader and a Staff Representative also attend committee meetings and participate in decision making except where there is a direct conflict of interest (for example when deciding salaries and budget setting)

## Appointing trustees

Charminster Pre-School is committed to engaging a diverse committee of trustees, which reflects the society in which we operate. The trustees of Charminster 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 years who have either family or affiliate membership with the charity are eligible to be elected as a trustee.

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.charity-commission.gov.uk](http://www.charity-commission.gov.uk)).

The trustee role is also subject to suitability checks by Ofsted ([www.ofsted.gov.uk](http://www.ofsted.gov.uk)), which include a DBS 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 management committee or committee members) are jointly responsible for the effective running of Charminster 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.

The 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 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 trustees' responsibilities is provided within the attached Trustee Role Description 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.

### **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:

Charminster Pre-School Committee Role Description

[Charminster Pre-School Constitution](#)

[Charminster Pre-School Policies](#)

[Early Years Foundation Stage](#) (a brief overview of the EYFS can be found by following this link and the full document can be downloaded from this page)

[Charminster Pre-School Ofsted Report](#)

Dorset County Council 'Welcome To Your Committee' booklet

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 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. Charminster Pre-School runs according to a [Early Years Alliance](#) Constitution, the trustees can contact the Alliance Information Service team if they have any questions on running as a charity.

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 finances comply with relevant financial requirements and are managed in accordance with the 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. The accounts are independently examined by Edwards and Keeping.

### **Managing employees**

Charminster Pre-School employs a team of Early Years' Practitioners to manage the day to day running of the childcare provision and an administrator and accounts administrator to assist with the effective administration of the charity

As a trustee of Charminster 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**

Charminster Pre-School is registered with the Charity Commission, 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**

Charminster Pre-School is registered as a childcare provider with Ofsted. 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 planned 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 Preschool Leader, 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', a notification form (EY3) must be completed to inform Ofsted. Ofsted will carry out a number of checks to determine that the trustees are suitable to provide childcare; including a criminal records check. Each new trustee will need to complete a declaration and consent form (EY2) to allow Ofsted to carry out an enhanced criminal records check. All trustees have shared responsibility for the childcare provision. The 'nominated person' who acts as the main contact between Ofsted and the trustees is Rachel Shaw, Preschool Leader.

### **Safeguarding children**

Charminster 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. Rachel Shaw

and Sally Porter have both undertaken level 3 safeguarding courses and are proactive in ensuring all safeguarding measures are in place.

### **Health and safety**

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

### **Confidentiality and data protection**

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 Data Protection Act, which provides strict rules in this area. Please refer to the charity's confidentiality and information sharing policies.

### **Expenses**

Trustees are entitled to be reimbursed for any reasonable expenses they incur that are necessary to enable them to carry out their trustee duties for Charminster 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. Expected expenses should be discussed with the chairperson and committee prior to any money being paid out to ensure that reimbursement is likely.

### **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.

Charminster 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 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. Charminster Pre-school has a reserve fund of approximately 6 months running costs and has insurance with the Early Years Alliance.

### **Further information**

The trustees of charities running to the Early Years Alliance Constitution can contact the Information Service team, for advice, support and a variety of resources:

T. 0207 697 2595    E. [info@eyalliance.org.uk](mailto:info@eyalliance.org.uk)    W. [www.eyalliance.org.uk](http://www.eyalliance.org.uk)

The Alliance Shop provides an extensive range of publications covering the various aspects of managing a childcare charity. Of particular interest is *Charity Essentials* (2011), which introduces the different forms and governing documents that charities may take, and the registration and regulation requirements for charities. It also explores the roles and responsibilities of charity trustees and provides practical guidance on the different types and purposes of meetings; managing charity finances; and recruiting and effectively managing a team of practitioners.

T. 0300 330 0996    E. [shop@eyalliance.org.uk](mailto:shop@eyalliance.org.uk)    W. [www.eyalliance.org.uk/shop](http://www.eyalliance.org.uk/shop)