

Workshop Description

Understanding Fundraising - the Roles and Responsibilities of Trustees

This one day interactive workshop will provide trustees with all the information and guidance they need to understand the basic principles of fundraising, the role of fundraising in their heritage charity, the new regulatory systems proposed for fundraising and the specific responsibilities trustees have with respect to fundraising.

Why Heritage Charity Trustees need to make themselves aware of the provisions of the 2016 Charities Act and new Charity Commission guidance

- The 2016 Charities Act includes new powers for the regulator to disqualify trustees.
- New guidelines on fundraising practice apply to all Trustees
- Trustees should be aware of the new regulatory framework for fundraising and how it applies to their organisation.
- New guidelines on applying for social investment funds on behalf of charities.
- The provisions of the 2016 Charities Act will gradually come into force between July 2016 and April 2017.

The Changing Landscape: New Charity Commission Guidance:

"Our guidance isn't there to dwell on the mistakes that have been made or simply set the parameters within which we can hold people to account (although it does do that). Instead, we hope it will offer a framework for a step change in charities' approaches to fundraising. It provides trustees with the tools they need to do more than just meet the basics and will help them succeed in raising much needed funds while protecting their charity's reputation."

Sarah Atkinson, Director of Policy & Communications – Charity Commission

"It is crucial that trustees, in their governance role, take an active interest in fundraising as an activity to help ensure that the values of their organisation are reflected in the way they raise money. We hope that this revised guidance will support trustees by enabling them to better understand their duties when it comes to fundraising."

Peter Lewis, Chief Executive – Institute of Fundraising

Who Should Take This Workshop?

This course is designed specifically for trustees - whether you are a new trustee and see the workshop a valuable part of your induction or an established trustee who wants a greater understanding of the fundraising issues that are relevant to the trustee role.

Learning Outcomes

On completion of this workshop, it is expected that learners will be able to:

1. understand how fundraising fits in to the overall charity funding mix
2. understand the general principles of fundraising
3. appreciate the cause of the media attention given to fundraising in recent months
4. have awareness of the proposed regulatory system for fundraising
5. understand their role and responsibilities as trustees in relation to fundraising
6. develop a set of tools to provide assurance that fundraising activity is being carried out effectively and appropriately in their charity.

Outline of Content

1. How charities are funded and the role of fundraising
2. The general principles of fundraising
3. The current fundraising environment and proposed regulation
4. The Charity Commission's guidance on the responsibilities of trustees
5. Gaining assurance with respect to fundraising

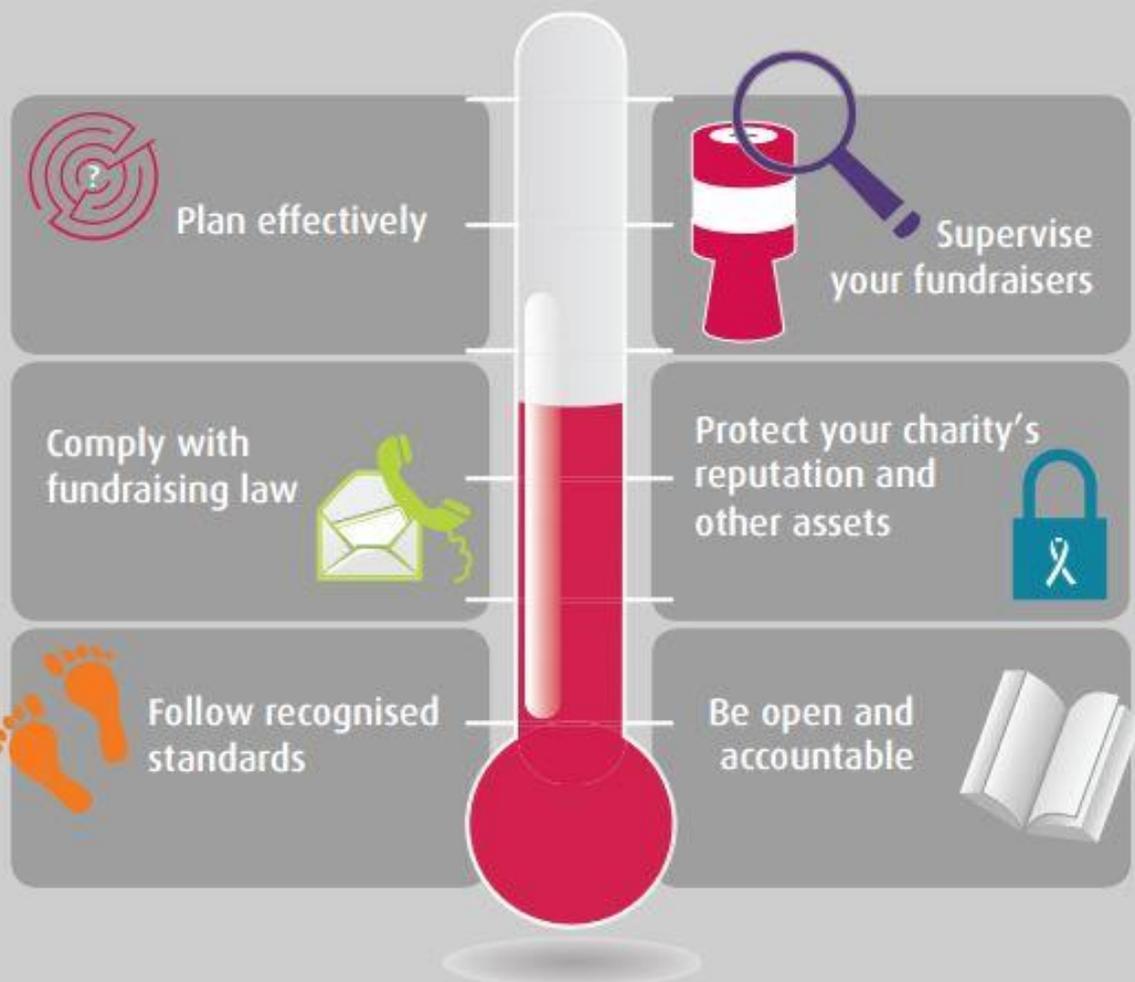
Learning Methods

The workshop will use a range of methods including:

- Trainer directed presentation
- Learner personal reflection
- Whole group discussion
- Small group exercises
- Practical tasks in pairs



Key fundraising principles for trustees



Read our fundraising guidance at
www.gov.uk/charity-commission

The Essential Trustee

6 main duties

