

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.

Executive Committee can also be read as Board of Trustees.

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 Table 2: Appointments

<https://prep.scouts.org.uk/por/the-appointment-process/table-2-appointments/>

This workbook may be used to support individuals where, for accessibility reasons, they cannot complete this training independently using the eLearning here <https://scouts.org.uk/volunteers/learning-development-and-awards/getting-started-training/trustee-introduction/> 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 the Executive Committee and trusteeship in Scouts**
- **Understand Scouts' key policies**
- **Understand the roles and responsibilities of Executive Committee members and trustees in Scouts**

Some Charities within Scouts use the term "Board of Trustees" as their managing Trustees. This is and acts in the same way as the Executive Committee.

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 on the Scouts Membership System (Compass) for you.

Lesson 1: Introduction

As a volunteer, and particularly as a charity trustee, for a Scouts charity, there are a few key responsibilities on your shoulders. 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 (<https://scouts.org.uk/volunteers/learning-development-and-awards/getting-started-training/essential-information/>) or working through a workbook. Your line manager, Training Adviser or Training Manager will be able to help you with this.

Lesson 2: Understand Executive Committee 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 approves the Executive Committee. Members of this Executive Committee are known as the **charity trustees**, and have to act as one big 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 Executive Committee. You're not dealing with anything alone.

The Charity Commission 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. <https://www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3>

Regional variations and official regulators

Depending on where you live, there are different regulators whose regulations you need to follow.

Each Group, District, County and Country, as well as UK HQ, are separate entities with their own Executive Committee. 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.

<https://www.gov.uk/government/organisations/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 <https://www.scouts.org.uk/por/13-trusteeship-property-and-equipment/#13.3>

There's plenty of guidance available to help with updating the Charity Commission for England & Wales.

https://members.scouts.org.uk/documents/AdultSupport/Executive_committees/Guidance%20for%20updating%20the%20Charity%20Register%20v1.pdf

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. <https://www.charitycommissionni.org.uk/>

You can find out more about being a Trustee in Northern Ireland here. <https://www.charitycommissionni.org.uk/start-up-a-charity/trusteeship>

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 (<https://www.scouts.org.uk/about-us/support-scouts/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).

<https://www.oscr.org.uk/>

There is a Scottish Variations to POR which includes more specifics for members in Scotland.

<https://www.scouts.scot/scottish-por/>

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.

<http://guernseyregistry.com/article/156443/CharityNPO-Legislation--Regulations>

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. <https://charitycommissioner.je/>

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. <https://www.gov.im/categories/home-and-neighbourhood/charities/>

British Scouting Overseas

For British Scouting Overseas (BSO) (<https://www.britishscoutingoverseas.org.uk/>), 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 Executive Committees 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 here. <https://www.scouts.org.uk/por/13-trusteeship-property-and-equipment/#13.1>

The full list from the Charity Commission can be found online here. <https://www.gov.uk/guidance/automatic-disqualification-rules-for-charity-trustees-and-charity-senior-positions>

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. <https://www.scouts.scot/scottish-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.

It's the responsibility of each individual charity trustee to make sure they're personally not disqualified from being a charity trustee.

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.

Bailiwick of Guernsey

In Guernsey, the Charities and Non Profit Organisations Law provides information on charity trustees.

<http://www.guernseylegalresources.gg/article/91269/Charities>

Jersey

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

<https://charitycommissioner.je/for-charities/guidance-for-governors/>

Isle of Man

The Charities Registration and Regulation Act defines those who would not be eligible for being a charity trustee. You can see the Charities Registration and Regulation Act here.

<https://www.gov.im/categories/home-and-neighbourhood/charities/>

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 needs trustees to manage the charity.

All members of the Executive Committee or Board of Trustees are called charity trustees.

The Executive Committee must meet the charity regulations for the location they are operating in regarding the trusteeship of the charity (the group, District or County) and must help provide quality Scout sessions, fun and adventure, to the members in their local area.

Chair

The Chair is responsible for making sure our Legal and Governance requirements are met. They objectively chair the meetings of the Executive Committee. Working with the Secretary, they'll plan the schedule of meetings and will set the agenda. They'll see to it that any decisions made by the Executive Committee get put into action. The Chair will also resolve any conflicts, and make sure that all Executive Committee Members are properly trained and understand their own responsibilities.

Secretary

The Secretary works closely with the Chair to offer administrative support for the Executive Committee. Their role is to help with putting together agendas and any of the more practical aspects of organising meetings. The Secretary takes charge of the document side of things – sending out agendas, taking minutes and making sure everyone who attends the meetings have all the documents they need to get involved. The Secretary also keeps on top of other documentation, like insurance information, and records ownership of any property and equipment.

Treasurer

The Treasurer's main responsibilities revolve around creating budgets and financial documentation. They create the Annual Statement of Accounts and keep track of the independent examination process which all the accounts must receive.

Members

Executive Committee Members should take an active part in all the meetings and decisions taken by their committee. The best way they can support the committee is to step up to the plate on specific tasks that suit their skillset.

There are also a few different categories that Executive Committee Members can fall into. Simply put, these categories are based on how the different members came to be a part of the Executive Committee.

Ex-officio Members

Ex-officio members are people who are on the Executive Committee automatically as a result of the role they hold.

At group level, this is the Group Chair, Secretary, Treasurer, Group Scout Leader, Assistant Group Scout Leader and the Sponsoring Authority or nominee. All Section Leaders (including Explorer Scout Leader if stated in a partnership agreement), need to let it be known at the AGM (Annual General Meeting) that they're happy to take up this responsibility.

At District level, this is the District Commissioner, the Chair, Secretary, Treasurer, District Explorer Scout Commissioner, District Scout Network Commissioner and District Youth Commissioner (except Scotland).

At County level, this is the County Commissioner, the Chair, Secretary, Treasurer, as well as the County Youth Commissioner (except Scotland).

Elected Members

If you want to be elected to the Executive Committee, you'd have to make it known before or at your Annual General Meeting. The number of elected members will depend upon several factors, including: size of the charity, number of sections and property ownership.

Nominated Members

The Group Scout Leader and District or County Commissioners can all nominate people to become Executive Committee Members. Anyone who's nominated has to get the seal of approval at the Annual General Meeting (more on this in the next topic). Anyone who becomes an Executive Committee Member in this way are then known as nominated members.

There can't be more nominated members than elected members on an Executive Committee.

Co-opted Members

If an Executive Committee needs a new member with a particular skill set, or to do a particular task, they may recruit someone specifically to take on that role. Anyone who joins an Executive Committee in this way is known as a co-opted member.

Again, there can't be more co-opted members than elected members on an Executive Committee and in reality co-options take place between Annual General Meetings.

Right of Attendance

Some other people have a right to attend meetings of the Executive Committee 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 Executive Committee meeting, and the County Commissioner and County Chair have right of attendance at a District Executive Committee meeting.

Group Scout Leaders, District and County Commissioners

These are the three roles that work with the Executive Committee 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 **eight** 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. <https://www.scouts.org.uk/por/>

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. **Development Policy**
2. **Equal Opportunities Policy**
3. **Privacy and Data Protection Policy**
4. **Religious Policy**
5. **Safeguarding Policy**
6. **Safety Policy**
7. **Vetting Policy**
8. **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. <https://www.scouts.org.uk/por/2-key-policies/>

Equal Opportunities 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 Equal Opportunities Policy here. <https://scouts.org.uk/por/2-key-policies/equal-opportunities-policy/>

Development Policy

Subject to the rules governing age ranges and mixed membership, the Scout Movement is open to all young people of whatever background.

Scouts recognises, however, that access to Scouts is not equally available to all groups and communities across society as a whole.

In particular, through the use of innovation and experiment, we support local Scouts in meeting the needs of young people in areas of urban disadvantage or priority, in highly rural areas, and among the minority ethnic communities.

We also work in collaboration with other agencies to support those disadvantaged young people who might benefit from the programme and ethos, and who may never become full members of the movement.

You can read more about the Development Policy here. <https://scouts.org.uk/por/2-key-policies/development-policy/>

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. <https://scouts.org.uk/por/2-key-policies/privacy-and-data-protection-policy/>

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. <https://www.scouts.org.uk/about-us/policy/data-protection-policy/>

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. <https://scouts.org.uk/por/2-key-policies/religious-policy/>

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 Young People First Code of Practice, known as the Yellow Card, that's there to help with safeguarding concerns. <https://www.scouts.org.uk/volunteers/staying-safe-and-safeguarding/safe-scouting-cards/young-people-first-yellow-card/>

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. <https://scouts.org.uk/por/2-key-policies/safeguarding-policy/>

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.

<https://www.scouts.org.uk/volunteers/learning-development-and-awards/ongoing-training-for-all/safeguarding/>

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 (<https://scouts.org.uk/por/2-key-policies/safety-policy/>and information for practical delivery here (<https://www.scouts.org.uk/volunteers/staying-safe-and-safeguarding/safety/>).

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.

<https://www.scouts.org.uk/volunteers/learning-development-and-awards/ongoing-training-for-all/safety/>

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. <https://scouts.org.uk/por/2-key-policies/vetting-policy/>

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. <https://scouts.org.uk/por/2-key-policies/youth-member-anti-bullying-policy/>

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

<https://scouts.org.uk/about-us/policy/volunteer-anti-bullying-and-harassment-policy-procedures/>

Lesson 4: Understand the roles and responsibilities of Executive Committee members and Trustees in Scouts

Key responsibilities of the charity trustees in Scouts

Scout Group

Members of the Executive Committee must act collectively as charity trustees of the Scout Group, and in the best interests of its members to:

- Comply with the Policy, Organisation and Rules of Scouts.
- Protect and maintain any property and equipment owned by and/or used by the Group.
- Manage the Group finances.
- Provide insurance for people, property and equipment.
- Provide 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.
- Manage and implement the Safety Policy locally.
- Make sure that a positive image of Scouts exists in the local community.
- Appoint and manage the operation of any sub-Committees, including appointing a Chair to lead the sub-Committees.
- 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 members of the Executive Committee.
- 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 Executive Committee; and if a registered charity, to the appropriate charity regulator if the regulator's rules require it.
- Maintain confidentiality with regard to appropriate Executive Committee 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. <https://www.scouts.org.uk/por/3-the-scout-group/#3.23>

Scout District

Members of the Executive Committee must act collectively as charity trustees of the Scout District, and in the best interests of its members to:

- Comply with the Policy, Organisation and Rules of Scouts.
- Protect and maintain any property and equipment owned by and/or used by the District.
- Manage the District finances.
- Provide insurance for people, property and equipment.
- Provide 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.
- Manage and implement the Safety Policy locally.
- Make sure that a positive image of Scouts exists in the local community.
- Appoint and manage the operation of any sub-Committees, including appointing a Chair to lead the sub-Committees.
- 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 members of the Executive Committee.
- 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 Executive Committee; and if a registered charity, to submit them to the appropriate charity regulator.
- Maintain confidentiality with regard to appropriate Executive Committee 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. <https://www.scouts.org.uk/por/4-the-scout-district/#%204.25>

Scout County

Members of the Executive Committee must act collectively as charity trustees of the Scout County, and in the best interests of its members to:

- Comply with the Policy, Organisation and Rules of Scouts.
- Protect and maintain any property and equipment owned by and/or used by the County
- Manage the County finances.
- Provide insurance for people, property and equipment.
- Provide 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.
- Manage and implement the Safety Policy locally.
- Make sure that a positive image of Scouts exists in the local community.
- Appoint and manage the operation of any sub-Committees, including appointing a Chair to lead the sub-committees.
- 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 an Appointments Advisory Committee, including appointing an Appointments Committee Chair to lead it.
- Appoint Administrators, Advisers, and Co-opted members of the Executive Committee
- 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 Executive Committee 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. <https://www.scouts.org.uk/por/5-the-scout-county/#5.16>

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. <https://www.scouts.org.uk/por/2-key-policies/>

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 Executive Committee 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 Executive Committee. This means the committee also becomes the Managing Controller of the premises, if owned by Scouts.

As such, Executive Committees need to be checking that premises are safe. This includes, 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 Executive Committee 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. <https://www.scouts.org.uk/volunteers/staying-safe-and-safeguarding/safety/managing-a-safe-scout-premises/>

Advice on carrying out risk assessments, communicating controls with the users of the premises and a safety checklist can be found here. <https://www.scouts.org.uk/volunteers/staying-safe-and-safeguarding/safe-scouting-cards/staying-safe-safety-checklist/>

The Executive Committee could appoint someone to look after the care and control of the equipment.

This individual/s 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 Executive Committees and trustees (Trustee Indemnity), as long as they acted correctly.

You can find out more about Unity insurance services here. <https://www.unityinsuranceservices.co.uk/scout-insurance>

There's a handy chapter in Policy Organisation and Rules on Insurance responsibilities which can be found here. <https://www.scouts.org.uk/por/8-insurance/#%208.1>

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 Executive Committee is to make sure that there's enough funding for Scouts to properly operate, and so may have a sub-committee set up that's all about supporting and organising fundraising activities. Leaders can't be on a fundraising committee though.

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. <https://www.scouts.org.uk/about-us/support-scouts/gift-aid/>

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 Executive Committee.

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.

There's a useful guide for all Group Treasurers, with lots of in-depth information included, this guide can be found here.

https://members.scouts.org.uk/documents/AdultSupport/Executive_committees/A%20Guide%20for%20The%20Group%20Treasurer%20v6.pdf

Incident reporting

Sometimes things will go wrong. Members of the Executive Committee 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. <https://www.gov.uk/guidance/how-to-report-a-serious-incident-in-your-charity>

Scotland

View incident reporting guidance for Scotland. <https://www.oscr.org.uk/managing-a-charity/notifiable-events/>

Northern Ireland

View incident reporting guidance for Northern Ireland. <https://www.charitycommissionni.org.uk/news/serious-incident-reporting-a-guide-for-charity-trustees-1/>

Record keeping – complaints

Each Executive Committee (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 <https://www.scouts.org.uk/contact-us/raising-a-concern/complaints-and-handling-personal-data/>

Youth Shaped Scouts

Every week, Scouts give almost half a million people 6-25 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.

County and District Executive Committees 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 committee 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 sub-committee of the Executive Committee or other non-executive committees.

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 Executive Committee Members attend, along with as many members as possible from the Scout Group, District or County Scout Council. Many of the Executive Committee'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 Executive Committee and other key roles for the next year.

To comply with Regulator requirements, the Trustee Annual Report should follow the formats seen here.

<https://members.scouts.org.uk/supportresources/1829/trustees-annual-report?cat=55.261.395&moduleID=10>

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, Treasurer and Secretary are trustees
- B. All members of the Executive Committee for a registered charity
- C. Only Ex-Officio and Elected Members are trustees
- D. No member of the Executive Committee is a trustee

Trustee roles

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

	Number	
A: With the Secretary, they plan meeting's agenda and ensure decisions are put into action.		1. Treasurer
B: Provides admin support, including meeting, insurance, property and equipment documentation		2. Elected members
C: Creates the annual statement of accounts and ensures they go through the exam process.		3. Chair
D: People who are on the Executive Committee automatically due to a role they hold.		4. Co-opted members
E: These members are added to the Executive at the AGM.		5. Secretary
F: Members with a particular skill set, or to do a particular task.		6. Ex-officio members

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. Equal Opportunities Policy
- C. Safety Policy
- D. Vetting Policy
- E. Safeguarding Policy
- F. Youth Member Anti-Bullying Policy
- G. Development Policy

H. 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. Equal Opportunities Policy
- C. Safety Policy
- D. Vetting Policy
- E. Safeguarding Policy
- F. Youth Member Anti-Bullying Policy
- G. Development Policy
- H. 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. Equal Opportunities Policy
- C. Safety Policy
- D. Vetting Policy
- E. Safeguarding Policy
- F. Youth Member Anti-Bullying Policy
- G. Development Policy
- H. 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. Equal Opportunities Policy
- C. Safety Policy
- D. Vetting Policy
- E. Safeguarding Policy
- F. Youth Member Anti-Bullying Policy
- G. Development Policy
- H. Privacy and Data Protection Policy

Safety

Question 7: Executive Committees have a responsibility to make sure Scout premises are safe. Select the 7 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.