

TRUSTEE INDUCTION

1. Introduction

This document is intended as an overview of the requirements of a Trustee and to act as a signpost to information for new Trustees of Fleet & District u3a. It will identify both internal and external relevant references.

2. Requirements of a Trustee

Overview

New Trustees are required to familiarise themselves and the Trustee Code of Conduct (England & Wales) and build an understanding of their roles and responsibilities.

- Trustees must read the Charity Commission leaflet CC3 entitled 'The Essential Trustee'.
- Trustees must comply with Charity Law and the requirements of the Charity Commission as regulator.
- Trustees are expected to know, follow and promote the Principles of the u3a Movement at every opportunity.
- Trustees must always act in the best interests of Fleet & District u3a and the u3a Movement, strive to uphold its reputation and never do anything which could bring Fleet & District u3a or the u3a Movement into disrepute or expose it to undue risk.
- Trustees are expected to use Fleet & District u3a's resources responsibly and only to further its stated charitable objects/purposes.
- Trustees are expected to reflect the current organisational policy of Fleet & District u3a, regardless of whether it conflicts with their personal views.
- Trustees are expected to abide by Fleet & District u3a's governance procedures and practices.
- Trustees must never derive any pecuniary benefit from being a Trustee and must notify the Chair of any gifts received.
- Trustees should inform the Chair before accepting an invitation to speak on behalf of the u3a.
- Trustees are expected to always treat fellow committee members courteously and maintain a respectful attitude towards the opinions of others.
- Organisational, committee and individual confidentiality must be respected at all times.

Trustees' Responsibilities and Duties

A u3a's committee members take on the role of Trustees of the charity. Committee

members are responsible for the governance of the u3a including directing how it is managed and run. The Trustees must make sure that the u3a is carrying out the purpose for which it is set up, and that all resources and funds are used only in furthering its charitable objective.

Trustees are collectively responsible for ensuring that a u3a fulfils its charitable objectives and does not stray beyond them. The central purpose of every u3a is educational. Trustees collectively are responsible for the safe custody of members' money.

Trustee Code of Conduct

A Trustee code of conduct is an agreement between the organisation and the individual committee member which clarifies the standard of behaviour expected in the performance of their role. The Fleet & District u3a code of conduct can be found on our website.

Trusteeship (England and Wales)

All u3as are charities whether they are registered or not due to the charitable purpose that is contained within the constitution. This status means that all committee members are Trustees. The Charity Commission publishes guidance on the role of Trustees – 'The Essential Trustee' CC3 which committee members need to familiarise themselves with.

The Essential Trustee highlights some key areas of Trusteeship which includes:

- Ensuring your charity is carrying out its purposes for the public benefit
- Complying with your charity's governing document and the law
- Acting in your charity's best interests
- Managing your charity's resources responsibly
- Acting with reasonable care and skill
- Ensuring your charity is accountable

Trustees are also required to sign a Trustee eligibility form to declare their suitability for a Trustee role.

Trustee Indemnity Insurance

u3a committees are covered by Trustee Indemnity Insurance provided through the Third Age Trust. The insurance protects u3a Trustees both individually and as a board, against a genuine mistake or error of judgement providing that they have acted responsibly and followed their u3a's constitution. Where this is deemed not to be the case, Trustees risk being held personally responsible and not being covered by indemnity insurance. Trustees should also be aware that even if an allowable claim is made, an excess will apply. The indemnity insurance will not protect against criminal law.

In the event of any irregularity at either main committee or group level, the Trustees are potentially liable if they have not taken all reasonable steps to minimise risks. Trustees

must follow the requirements of the appropriate regulatory authority for their country in relation to any reporting requirements. It is not possible for an individual Trustee to opt out of collective responsibility.

In addition, responsibility must never be given to a Group Leader to operate a group that is in any way detached from the u3a. Trustees retain overall responsibility of the u3a and its activities. All money collected is the property of the u3a and it must all be accounted for to the membership at the AGM and to the appropriate regulatory authority, as required.

3. Induction Information

Ideally the present incumbent of any role will be available and willing to provide a necessary handover to their successor. If this is not possible another current member of the Committee should take on this role.

The following is a list of information and documents that should be read as part of the induction process:

The Charity Commission:

Charity Commission trustee guidance	Charity Commission guidance - GOV.UK Charity trustee: what's involved (CC3a) - GOV.UK The essential trustee: what you need to know, what you need to do - GOV.UK
Declaration of Eligibility – this document is for a new Trustee to sign	Fit and proper persons helpsheet and declaration (will be supplied by the Secretary and after signature be retained on file)

The u3a Third Age Trust:

Principles of the u3a	u3a - Vision and Mission
The Trust website - holds up to date information and advice for new and existing Trustees; to gain access - register and login	u3a - Info for new u3a Trustees - which contains links to: • Workshops - u3a - Workshops • advice and information - u3a - Members Area • online learning events - u3a - Learning in the u3a movement

The Trust's e-newsletter	All Fleet u3a members are sent the Trust's National e-newsletter monthly which contains useful information about the work of the Trust and the wider U3A Movement and it is available on our website
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Fleet & District u3a:

Website	https://fleet.u3asite.uk/
Constitution	https://fleet.u3asite.uk/wp-content/uploads/2024/11/Fleet-U3A-Constitution-November-2023.pdf
Committee Roles and Responsibilities	https://fleet.u3asite.uk/wp-content/uploads/2024/09/Fleet-U3A-Committee-Role-descriptions-2023.pdf
Member Code of Conduct	https://fleet.u3asite.uk/wp-content/uploads/2025/04/Member-Code-of-Conduct-Fleet-u3a-Apr-2025.pdf
Data Protection Policy	https://fleet.u3asite.uk/wp-content/uploads/2025/04/Data-Protection-Policy-Fleet-u3a-Apr-2025.pdf
Data Privacy Policy	https://fleet.u3asite.uk/wp-content/uploads/2025/04/Data-Privacy-Policy-Fleet-u3a-Apr-2025.pdf
EDI Policy	https://fleet.u3asite.uk/wp-content/uploads/2025/04/EDI-Policy-Fleet-u3a-Apr-2025.pdf
Safeguarding Policy	https://fleet.u3asite.uk/wp-content/uploads/2025/05/Safeguarding-Guidance-Policy-and-Procedure-Fleet-u3a-Apr-2025.pdf
Health & Safety Policy	https://fleet.u3asite.uk/wp-content/uploads/2025/04/Health-and-Safety-Policy-Fleet-U3A-Apr-2025.pdf
Complaints Procedure	https://fleet.u3asite.uk/wp-content/uploads/2025/04/Complaints-Procedure-Fleet-u3a-Apr-2025.pdf
Disciplinary Procedure	https://fleet.u3asite.uk/wp-content/uploads/2025/04/Disciplinary-Procedure-Fleet-u3a-Apr-2025.pdf

Annual Agenda Plan	https://fleet.u3asite.uk/wp-content/uploads/2025/05/Annual-Agenda-Plan-2024-25-2.docx
Insurance	https://fleet.u3asite.uk/wp-content/uploads/2025/01/Insurance-cover-note-2025.pdf
Wider Regional Network	https://southeast.u3asite.uk

Action	Date
Adopted	Dec 2025
Updated and Approved	Dec 2025
Reviewed - no change required	Jan 2026