



Lee Stevenson, Organisational Support Officer at Stirlingshire Voluntary Enterprise, shares practical insights into what makes an effective charity trustee.

Are you thinking about volunteering on the board of a charity? Before taking that step, it is important to understand what the trustee role involves.

In my role providing guidance and practical support to trustees of Scottish charities, I often meet people who come into the position with good intentions, but a lot of uncertainty. They want to help, they care about the cause, but they are not always clear on what the role really involves.

What I have learned is this. Volunteering as a trustee is not about being an expert or having all the answers. It is about taking responsibility, asking the right questions, being prepared to stand behind the decisions you make as part of a board. It's also about understanding your duties and responsibilities when it comes to governing a charity.

Here is how I tend to explain it to the trustees and potential trustees who approach me for support.

It is a voluntary position of trust, not just a title

The word *'trustee'* matters. It reflects the fact that you are being trusted, by the public, by funders, and by the people the charity supports.

From where I stand, the most effective trustees are the ones who take that seriously. They

- Think carefully about decisions, not just agree for the sake of it
- Stay focused on the charity's purpose
- Remember that they are there to serve the organisation, not themselves

It is not about status. It is about stewardship.

Your core duties are simpler than they sound

When trustees hear about legal duties, it can feel overwhelming at first. But in practice, I break it down into a few key expectations.

I encourage trustees to focus on whether they are:

- Acting in the best interests of the charity

- Making sure the charity does what it was set up to do
- Looking after funds and resources properly
- Being open, honest, and accountable

If those foundations are in place, most of the rest follows.

You don't need all the answers, but you do need to stay engaged

One of the most common misunderstandings I hear is that trustees need to be experts. In reality, that is not the case.

What really matters, and what makes the biggest difference, is how engaged you are in the role. The most effective trustees I see are the ones who:

- Take time to read papers before meetings
- Ask questions when something is not clear
- Speak up if they feel unsure or uncomfortable about a decision
- Make the effort they understand the charity's governing document, and the rules it operates by

It's not about knowing everything. It's about being present, curious, and willing to take part.

The real work happens between meetings

From the outside, this volunteer role can look like a few meetings a year. In practice, that is only part of it.

The trustees I see adding the most value are the ones who:

- Take time to understand the information in front of them
- Reflect on risks and opportunities before decisions are made
- Follow through on actions rather than leaving everything to staff or volunteers

It does not need to take a huge amount of time, but it does need attention.

Good governance is about balance

A big part of my work is helping boards find the right balance.

Trustees need to:

- Support and encourage the people running the charity day to day
- But also provide appropriate oversight and challenge

Lean too far one way, and you risk becoming too hands off. Lean too far the other, and you risk stepping into operational work, rather than governance.

The best boards I work with are clear about that boundary.

Collective responsibility is real

One point I always stress is that decisions are made collectively. Even if you disagreed with something at the time, you still share responsibility for the outcome.

That is why it is so important to:

- When a board works well, people feel comfortable asking Speak up during discussions
- Allow for an environment where every trustee has the opportunity and the confidence to contribute
- Make sure concerns are properly recorded
- Be prepared to stand behind the final decision

questions and challenging views without it turning into conflict.

The legal side matters, but it should not paralyse you

There is a tendency for some trustees to worry about getting things wrong. While that caution is understandable, it can sometimes hold boards back.

My guidance is usually this:

- Take your duties seriously
- Make informed and reasonable decisions
- Document your thinking where it matters
- Seek legal advice when it is needed
- Attend trustee training, which SVE regularly delivers free to our members
- Keep up to date with any changes in the law

Most issues arise not from honest mistakes, but from a lack of care or attention. If you are engaged and acting in good faith, you are already doing a lot right.

The impact is real

One of the most rewarding parts of my role is seeing what good trustees achieve.

When boards work well:

- Charities are more stable
- Decisions are clearer and better informed
- The organisation can focus on delivering real impact

Trustees do not always see that day to day, but their influence is significant.

Final thoughts

If I had to sum it up based on what I see in practice, being a trustee is about doing the basics well, consistently.

It is about:

- Turning up prepared
- Asking thoughtful questions
- Keeping the charity's purpose at the centre of decisions
- And all trustees understanding that they collectively share responsibilities

You do not need to be perfect. But you do need to be present, engaged, and willing to take responsibility.

And from my perspective as an Organisational Support Officer, those are the trustees who make the biggest difference.

Volunteering as a trustee can be highly rewarding, but it is important to take on the role with a clear understanding of what it involves.

Keep an eye out for a variety of governance training available to our members in the coming months.