

Trustee Snippets

February 2026

Your Trustee role

Please make sure your role is correctly reflected on the adult membership system; if you are a Chair person or Treasurer the system needs to reflect that. This will ensure you are able to receive all the relevant information for your role. Chair persons are also advised to check that all of their Trustee Board members are recorded as such on the adult membership system.

There are eligibility checks that need to be completed for Trustees. [Click here for the link.](#)

It is also of importance that new members of the Trustee Board are supported and given guidance during their initial period. Some of this support should come from the training modules but also from yourselves as existing members to ensure they settle into the meetings.

The trustee training modules are:

Safety

Safeguarding

Creating Inclusion

Data Protection in Scouts

Who We Are and What We Do

Being a Trustee in Scouts

[Click here for the above training modules.](#)

Safety and Safeguarding must be completed within the first 30 days and renewed every 3 years. The other four modules should be completed within 180 days.

Other support

Why not join the [Managers and Trustees in Scouting – the Scouts UK](#) Facebook group?

The National Council for Voluntary Organisations (NCVO) can be a valuable source of information. Membership is free to organisations with a gross annual income of less than £30,000! [Join NCVO](#)

Assessing and managing risks is a key function of the Trustee Board. The [Scout Group Trustee Checklist](#) and [Scout District Trustee Checklist](#) (resources produced by the County) provide a useful guide to many of the Trustee responsibilities.

The Checklists can also be found in the [County document store](#). The store also contains a number of County policy documents held in a format that allows them to be adapted for Group or District use.

The web page for [County Funds](#) (available to Districts and Groups) provides details of monies that may be available for certain projects/activities.

To help support your Trustee Board meeting here is a link to some useful prompts. [Trustee Board Meeting Agenda Prompts | Scouts](#)

Connecting Communities Berkshire (CCB)

CCB is a source of advice on matters relating to community buildings. The County is a member of CCB and Districts and Groups are able to access advice through that membership. [Click here for the CCB link.](#) Our contact is Kate Meads kate.meads@ccberks.org.uk

***Pro Bono* legal work**

LawWorks is a charity that provide connections to volunteer lawyers who might do *pro bono* legal work for non-profit organisations. [Click here for the LawWorks link.](#)

In the last year Groups in Berkshire have made use of both CCB and LawWorks!

Retention of financial records

The 2005 Charities Act and guidance from HM Revenue and Customs specifies that charities must keep accounting records for at least six years from the end of the financial year in which they are made. However, charity trustees should be aware that the length of time they need to keep records may also be governed by other legislation or by agreements with funding bodies.

In practice, however, you need to keep all records for seven years (as it's six years plus a year to count for the current financial year).

The records kept by charities will vary depending on circumstances and may be manual or computerised. Examples of records that a charity should keep are:

- a cash book recording day to day income and expenditure
- bank statements which are reconciled regularly (for example, monthly) with cash book records
- vouchers, invoices, receipts and other supporting evidence of income and expenditure.
- details of substantial donations and Gift Aid received

Examples of other records that a charity may keep are:

- a general ledger with supporting purchase and sales ledgers, recording day to day income and expenditure but also any sales or purchases that have not yet been paid
- computer spreadsheets
- commercial accounting software with supporting data
- payroll and PAYE records (if payroll is managed inhouse) – three years

You may want to consider how and where to store such Group records – keeping in mind that roles could change in the six year period.