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### Enjoy being a trustee?

We are concerned that potential trustees are being put off by the bad things they hear, making trustee recruitment difficult. However, we need your help to gather evidence of the positive experiences of existing trustees.

Please take a moment to complete our questionnaire at  
[www.trusteenet.org.uk/new/good-things-about-being-trustee](http://www.trusteenet.org.uk/new/good-things-about-being-trustee)

## news and opinion from a trustee's perspective

### Free fundraising health check

Fundraising HealthCheck is a free, confidential diagnostic tool to help you understand the impact of the recession on your fundraising activity.

Armed with your net income and/or your investment budget, you can use Fundraising HealthCheck to generate customised reports that provide:

- A prognosis for each area of your fundraising, based on past experience and current trends
- Practical advice and guidance on how to survive and thrive during the economic downturn

To find out more and sign up to use the tool go to -  
[www.fundraisinghealthcheck.org](http://www.fundraisinghealthcheck.org).

### Public benefit reporting

As a result of the Charities Act 2006 Trustees' Annual Reports submitted for periods on or after 1 April 2008 must include a report of activities undertaken by the charity to further its charitable purposes for the public benefit. The report should also include a statement as to whether they have complied with the duty to have due regard to public benefit. To help trustees do this, the Charity Commission has published guidance and two example reports which can be found at [www.charity-commission.gov.uk/publicbenefit/pbreport.asp](http://www.charity-commission.gov.uk/publicbenefit/pbreport.asp)

### Recession resources

NCVO has put together a guide for voluntary and community organisations on surviving the recession, from key advice to crisis management. Including –

- Advice on surviving the recession for voluntary and community organisations
- What can voluntary and community organisations do in the face of a financial crisis?

All this is available at- [www.ncvo-vol.org.uk/recessionresources/index.asp?id=13230](http://www.ncvo-vol.org.uk/recessionresources/index.asp?id=13230)

### Pension legislation is changing – is your organisation ready?

2012 will be a significant year for pensions, when The Pensions Act 2008 comes into effect. The Act will, for the first time, place a legal duty upon employers to enrol most employees into a pension scheme and contribute

### Practical Trusteeship Conference – DISCOUNT!!

On the 14 May CTN and DSC are putting on a conference designed to address some of the practical issues faced by trustees.

CTN members can get a discount – go to [www.trusteenet.org.uk/events/practical-trusteeship-conference](http://www.trusteenet.org.uk/events/practical-trusteeship-conference) for more information.

And...

Your charity may qualify for funding to pay for trustees to attend this conference. Go to

[www.trusteenet.org.uk/news/receive-1000-funding-help-your-organisation-grow](http://www.trusteenet.org.uk/news/receive-1000-funding-help-your-organisation-grow) to find out more.

towards their retirement. The move is aimed at getting an estimated seven million extra workers saving for retirement.

As part of the Government's reform of pensions, it intends to introduce a national system of 'personal accounts' from April 2012. Employers will not have to include employees in the new government scheme if they already include employees automatically into their own pension scheme which is at least as good as the new scheme.

From this date all eligible employees (staff aged between 22 and 75 years, who earn between £5,035 and £33,540 a year based on current pay levels) which are not already in a good quality workplace pension, will be automatically enrolled by their employer into a personal account although they will have the ability to opt-out. Both the employer and employee will have to pay into it. Staff aged 16-to-22 years can also opt in to pay employee contributions.

The Act's definition of 'eligible employees' also includes agency workers, fixed-term and part-time contract workers, and anyone who undertakes work in Great Britain, whether by written or oral contract. This means employers will need to pay contributions for workers, such as contractors, who did not previously qualify.

All qualifying employers will be required to contribute a minimum of 3% of salaries to an employee's workplace pension scheme, although initial contributions will be phased in over three years. This will supplement the 4% contribution from the employee and around 1% from the Government in the form of tax relief.

Any third sector employer who wish to find out more about this new legislation and want to consider how they are going to prepare for the change are invited to attend a free, practical workshop on the 28<sup>th</sup> April – go to [www.trusteenet.org.uk/events/pension-legislation-get-ready-change](http://www.trusteenet.org.uk/events/pension-legislation-get-ready-change) for more information. This is being hosted by pension and employee benefits advisers, Foster Denovo Ltd.

Alternatively, organisations can contact Ian Bird at Foster Denovo on 0845 838 6060 to find out more.

### Chances to have your say – open consultations

- **A risk and proportionality framework for the Charity Commission's services to charities** – this consultation is aimed at achieving greater clarity about the Commission's approach, and runs until 23 June. For more information and to take part in the consultation, go to [www.charitycommission.gov.uk/enhancingcharities/rpintro.asp](http://www.charitycommission.gov.uk/enhancingcharities/rpintro.asp)
- **Dormant Bank and Buildings Society Accounts Bill**: consultation on secondary legislation – This would extend the scope of the Financial Services Authority's regulation to include dormant accounts reclaim funds, and runs until 12 May. For more information and to take part in the consultation, go to [www.hm-treasury.gov.uk/consult\\_dormant\\_accounts\\_scheme.htm](http://www.hm-treasury.gov.uk/consult_dormant_accounts_scheme.htm)
- **NCVO Funding Commission** – NCVO has launched a Commission to explore the funding opportunities and challenges facing the voluntary and community sector in the next decade. The Funding Commission is seeking views on the issues it should be considering and any ideas or solutions to funding problems. The first phase of its consultation will run until 13 May. For more information and to complete the online questionnaire, go to [www.ncvo-vol.org.uk/policy/index.asp?id=12706](http://www.ncvo-vol.org.uk/policy/index.asp?id=12706)

## Endowment Asset Management Programme

Judge Business School is offering an intensive programme for trustees and senior financial advisors from charities and not-for-profit organisations on Endowment Asset Management. The programme includes sessions on performance measurement, sustainable funding, asset allocation, investment styles and the construction of portfolios, and takes place within the historic setting of the University of Cambridge.

For more information go to-

[www.jbs.cam.ac.uk/execed/open/endowmentasset.html](http://www.jbs.cam.ac.uk/execed/open/endowmentasset.html)

## Changes to Financial Thresholds - a big difference for charities

The Government Response to the Joint Commission/Office of the Third Sector consultation on financial thresholds has been published. It explains key changes to current thresholds in the Charities Acts. The most significant changes are:

- threshold for submission of annual accounts and Trustees Annual Report (TAR) to be raised from £10,000 to £25,000
- threshold for requiring accounts to be externally examined to be raised from £10,000 to £25,000
- threshold for preparation of accruals accounts to be raised from £100,000 to £250,000

The changes have effect from 1 April 2009.

The full report 'Financial Thresholds in the Charities Acts – Proposals for Change Government Response' published in August 2008 and the original consultation documents are available in the Office of the Third Sector website [www.cabinetoffice.gov.uk/third\\_sector](http://www.cabinetoffice.gov.uk/third_sector) and the Charity Commission website [www.charity-commission.gov.uk](http://www.charity-commission.gov.uk).

## In more detail: Creative Ways to Manage Your Staff Costs During a Recession

As the recession takes hold many organisations need to find ways to reduce their overheads. For some employers, this means redundancies and for others, adopting alternative ways to make the necessary cost savings whilst trying to maintain their existing staff in whom they have invested time and resources.

If you need to look at more creative ways to cut your costs, the following ideas may be worth exploring:

- Reaching an agreement with staff to reduce their salary or benefits. It is essential that staff agree to any such changes or you will be vulnerable to claims for breach of contract or unlawful deduction from wages. Those employees with a year's service would also be able to resign and claim constructive dismissal. Agreement should be reached through consultation and it is advisable to keep a written record of all discussions and meetings and record any agreed changes in writing.
- Promoting flexible working opportunities to staff, which could include working from home, job sharing or varying or reducing hours of work. Remember that any variation must be agreed and recorded in writing. Requests for flexible working must also be considered carefully to ensure compliance with the Flexible Working Regulations and in order to avoid complaints of indirect discrimination.

KEEP YOUR DETAILS UP  
TO DATE

If you are no longer a trustee or your details have changed, log in to [www.trusteenet.org.uk](http://www.trusteenet.org.uk) to update your details.

ANY OTHER BUSINESS?

Do let us have your feedback on this e-

newsletter by replying to this email. Let us know if we are getting it right or how we can improve this e-newsletter, trustee focus goes out bi-monthly, and we want as much content as possible to be from you - we would really welcome your ideas and submissions.

This newsletter is sent to you by Charity Trustee Networks (CTN)

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- Reviewing your employee benefits. It may be that by shopping around or engaging the services of a broker you can find alternative providers for your employee benefits, such as medical insurance and life assurance, which will save you costs.
- Introducing a sabbatical policy for staff, allowing a period of unpaid leave. This should be subject to management's final agreement based on operational requirements and employees taking sabbatical leave should be informed that no guarantees can be given regarding their role on their return. However, do also remember that during this period of leave employees will still have continuity of employment and advice should always be sought before a returning employee is dismissed. Again, the arrangement should be recorded in writing to avoid any uncertainty.
- Offering staff the opportunity to buy extra annual leave and therefore sacrifice their salary on a pro rata basis. Again, this may only be possible on a temporary basis and any arrangement needs to be clearly documented with all staff concerned.

Jo Atkinson is Head of HR and Legal with Harrison Rose Ltd, specialist in Human Resource Management. If you require advice, please contact her on Tel. 01483 813818 or at [ja@hrluk.co.uk](mailto:ja@hrluk.co.uk).

### **Free workshop for trustees on contracts and commissioning**

Thursday 7 May 2009, from 14.00 – 17.00 at 24 Stephenson Way, London, NW1 2DP

Trustees need to know the implications and challenges of tendering and contracting with government bodies to deliver public services. This free workshop comes with supporting materials and will:

- Help Trustees understand the implications and challenges of tendering and contracting with government bodies to deliver public services
- Provide clarity on roles and responsibilities, how the contract will further the charity's mission and how to ensure the sustainability and independence of their organisation

For more information go to <http://www.trusteenet.org.uk/events/free-workshop-trustees-contracts-and-commissioning>

### **Network Events in April, May and June**

Please go to [www.trusteenet.org.uk/events](http://www.trusteenet.org.uk/events) for more details of these and many more events.

- 20 April** – Hampshire Trustee Forum, Winchester
- 22 April** – Tameside Chairs Network
- 23 April** – Cumbria CVS Trustee Network – Carlisle
- 27 April** – Watford Charity Trustee Network
- 13 May** – Rickmansworth Trustee Network
- 14 May** – Honorary Treasurers' Forum, London
- 19 May** – Bath and North East Somerset Trustee Network
- 9 June** – Network of Women Chairs, London