



# Charity Trustee Training

## The Informed Trustee

Essential skills for charity board members

[www.step.org/informedtrustee](http://www.step.org/informedtrustee)

**50 hours of  
guided learning**



@InformedTrustee  
#informedtrustee

**STEP**   
ADVISING FAMILIES ACROSS GENERATIONS

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## The Informed Trustee

The Informed Trustee equips trustees with the knowledge needed to be successful charity board members. Providing full coverage of the legal, regulatory and financial requirements on charities across the UK, this innovative course will prepare you to make a powerful contribution at the board table.

Created to encourage a new generation to charity trusteeship and refresh the skills of existing trustees, the programme's editor-in-chief is Julie Hutchison TEP, a charity governance specialist at abrdn and a Full Member of STEP. The course content has been written by a team of more than 10 charity experts from leading UK law and accounting firms, providing distinct content relevant for England and Wales, Scotland and Northern Ireland.

Effective charity boards comprise trustees with a wide variety of skills, experience and perspectives. Being a charity trustee provides a great opportunity to make a difference to society, support a cause you feel passionately about and gain knowledge of the third sector. This course will provide you with the foundation knowledge to empower you to make a real difference as a charity trustee.

*I'd like to be a charity trustee, what's involved?*

*What skills and knowledge could I bring to the board of a charity?*

**Volunteer**

*I've been a trustee for a long time, is my knowledge up to date?*

*What do I need to know to be an effective board member on a charity?*

Course modules are written by charity experts in each of their respective fields from leading UK law and accountancy firms.

**To view author biographies please visit**

[www.step.org/informedtrustee](http://www.step.org/informedtrustee)



## Course Structure

This course is delivered online and on demand, and can be accessed via your desktop, tablet or mobile phone. The course focuses on real-life scenarios and the practical application of knowledge.

You will have access to the material for 12 months, during which you can work through the topics at your own pace.

This comprehensive course will require approximately 50 hours of study.

### The course comprises the following modules:

- Introduction
- Legal form of charity
- Roles and responsibilities
- Membership matters
- Communications and data
- Operations
- Fundraising
- Accounts
- Financial management and tax
- Risk management and sustainability
- Personal development pathway for charity trustees

View the full syllabus online

## Key Learning Outcomes

On completion of this course, you will be able to:

- Outline charity laws and regulations in the jurisdiction of the UK (being Scotland, or Northern Ireland, or England and Wales).
- Identify the responsibilities of a charity trustee from within a range of realistic scenarios.
- Explain charity tax and accounting concepts and information that is typically prepared and scrutinised by a board.
- Discuss different regulatory, legal and finance information in a charity context.
- Recognise relevant risk management and regulatory issues to consider in a range of realistic scenarios.

“As both a first time Trustee and new charity CEO, The Informed Trustee has been instrumental in catalysing my knowledge of critically important areas of charity governance.”

**Helen Carter, Director Francis C Scott Charitable Trust**

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### Entry Advice

This course is suitable for new trustees, those considering becoming a charity trustee for the first time, or for experienced charity trustees wishing to enhance their knowledge.

### Assessment

To achieve a course certificate candidates are required to sit a multiple choice test of 40 questions covering the course material, within 12 months of starting the course. It is not compulsory to sit the test, but a certificate can only be issued on successful completion of the test.

### Fee

£215 (inc VAT) for a 12 month licence to access the online material and the assessment.

**For further information please email**  
**[ctt@step.org](mailto:ctt@step.org)**

### Group Discounts

The following rate is offered for group bookings:

3-10 candidates: £149 (incl VAT)

If you have more than 10 candidates please contact **[ctt@step.org](mailto:ctt@step.org)**

"I feel it's a valuable course for new trustees to gain knowledge, and for more experienced trustees as a refresh to ensure they are up-to-date. I would also say it is helpful for charity CEOs to access the course, so they too have an understanding of charity governance.

**Menai Owen-Jones, Trustee of WCVA**

### About STEP

STEP is a not for profit body which promotes the interests of those working within the field of trusteeship. As a global association, STEP provides education in trusts and trusteeship and promotes high professional standards among its members. Full STEP members, known as TEPs, are internationally recognised as experts in their field. Our mission is promotion of education and high professional standards among our members, informing public policy and acting in the public interest. The production of this course is in line with STEP's mission to support civil society in the UK.

Find out more at **[www.step.org](http://www.step.org)**

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