

Effective Governance and Day to Day Operations.

What will this look like in practice?

Trustee Boards focus on effective governance and Group Leadership Teams focus on day to day operations.

The Group Leadership Team helps volunteers across all the sections of the group to work well together and feel motivated. They make sure the group is valued, respected, and supported in their local community.

Trustee Boards will focus on governance activities. Support activities (such as fundraising, premises management or administration), currently led by Executive Committees will move to other teams in the Group.

This means that 'governance' tasks are managed by the Trustee Board and 'operational' tasks are managed by the Group Leadership Team.

Some areas will be for trustees **to be confident** that they are being done. This is different from doing it themselves!

Some areas will be for trustees **themselves collectively** to do. These are the core governance tasks.

This means that 'operational' tasks such as maintaining the scout hut, or the day-to-day management of finances, or fundraising and similar are managed through the Group Leadership Team.

These operational tasks can be carried out by people who are also trustees, however, they will be managed as a member of the relevant team rather than in their trustee role.

Separating governance and operational tasks will also help as we recruit new volunteers - and to retain those already part of our teams. For example, the person who's great at managing the hall or running fundraising events might not have the skills, interests, or time to be a trustee - but they can still be involved, as a team member on the group leadership team or a sub-team of the group leadership team.

Examples of governance and operational tasks...

Governance tasks:	Support or operational:
<ul style="list-style-type: none"> • Make sure sufficient resources (funds, people, property and equipment) are available for the delivery of a high quality programme • Make sure the charity's finances are properly managed, including appropriate budgets • Make sure there's effective administration in place to support the work of the trustee board • Take responsibility for following Data Protection legislation • Make sure employed staff are managed effectively 	<ul style="list-style-type: none"> • Fundraising activities • Premises management • Equipment maintenance • Bookkeeping, banking, paying invoices and expenses • Distribute agendas, minutes, etc. for meetings and AGMs; • Manage appointments to the Board • Manage websites, email systems, or document storage • Act as line manager, supporting staff in their work

Try out the [governance? or support? activity](#) with your board members. This will help you explore together which tasks are part of a trustee board's responsibilities, and which are responsibilities that will be carried out by the group leadership team or sub-teams of the group leadership team.

Below we have provided two versions of the same list of responsibilities*:

List 1 - *In an ideal world- what we are aiming for...*

This is where you want to eventually be once your trustee board and leadership are running well and established.

List 2 - *In the real world - Go live, day 1*

This is where you may probably be on day one, when you leadership first meets. The aim is to move the red items listed in the governance column to the operations column (to bring you to list one)

* Not all responsibilities will be applicable to all groups

Find all out tools, resources, and lots more information at www.tinyurl.com/volunteer-journey

Group Management

In an ideal world- what we are aiming for...

Trustee Boards	Leadership Team
Governance	Operational
Finance	
<ul style="list-style-type: none"> • Make sure the group's finances are properly managed • Bank accounts • Grant applications • Annual Budget • Expenditure control • Capital expenditure • Gift Aid 	<ul style="list-style-type: none"> • Pay invoices and volunteer expenses • Collect membership Subscriptions • Day to day budget management • Monitor income and spend against agreed budgets • When needed, plan and run fundraising events • Manage section accounts
Leadership	
<ul style="list-style-type: none"> • Make sure sufficient resources (funds, people, property and equipment) are available for the delivery of a high quality programme 	<ul style="list-style-type: none"> • Recruitment • Welcome conversations • Screening (DBS and references) • Retention • Succession • Removal (in conjunction with Trustees) • Volunteer learning and development • Census
Community relations	
	<ul style="list-style-type: none"> • Create and look after relationships with other organisations to help the group grow locally • Create a positive image of the group in the local community. For example, through local media
Insurance	
<ul style="list-style-type: none"> • Have the right insurance for people, buildings, and equipment 	
Safety	
<ul style="list-style-type: none"> • Safety • Safeguarding • Risk Assessment 	<ul style="list-style-type: none"> • Safety • Safeguarding • Risk Assessment
Premises	
<ul style="list-style-type: none"> • Look after records of ownership of property and equipment • Make sure buildings and equipment are working well 	<ul style="list-style-type: none"> • Day to day management • Maintenance • Insurance valuations • Health & safety • Relationship with landlord/owner • Arrange relevant surveys (e.g. asbestos)
Minibus	
<ul style="list-style-type: none"> • Legislation • Insurance 	<ul style="list-style-type: none"> • Maintenance / MOT • day to day management • Driver training

Trustee Boards	Leadership Team
Governance	Operational
Section matters	
	<ul style="list-style-type: none"> • Programme • Moving up • County/District activities and events
Legal matters	Equipment
<ul style="list-style-type: none"> • As required • GDPR 	<ul style="list-style-type: none"> • Requirements • Management • Maintenance
Scouts policies & relevant legislation	I.T.
<ul style="list-style-type: none"> • Develop and maintain a risk register, including putting in place appropriate mitigations. • Maintain and manage a reserves policy, investment policy and public benefit statement • Other group policies • Follow POR, key policies and charity regulations • Put measures in place to make sure Scouts' safety policy is followed • Annual report and statement of accounts (checked by an appropriate person if required) • Annual charity return (if required) • Annual General Meeting (AGM) • Explorer Partnership Agreement • Network Agreement • Sponsorship Agreement 	<ul style="list-style-type: none"> • Set up and look after email, web site, social media, and web meeting systems (e.g. Zoom) • Create and maintain group policies in respect of areas of operational responsibility
Board management	
<ul style="list-style-type: none"> • Manage appointments to the Board • Keep a record of trustee board meetings, and complete any actions that are agreed • Recruit new trustees • Co-opt trustees onto the board if they need people with particular skills or knowledge • Get expert advice, if needed • Create sub-teams for specific activities, such as finances, if needed • Distribute agendas, minutes, etc. for meetings and AGMs 	<ul style="list-style-type: none"> • Manage relevant appointments to the Board • Distribute agendas, minutes, etc. for meetings and AGMs
Staff (Where staff are employed)	
<ul style="list-style-type: none"> • act as a responsible employer in accordance with legislation and Scouts values. 	<ul style="list-style-type: none"> • Act as line manager, supporting staff in their work



Group Management

In the real world - Go live, day 1

*How tasks could be divided between the Group Leadership Team and the Trustee Board on day 1.
The red task in the governance column eventually move across to the operational column*

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Governance	Operational
Finance	
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<ul style="list-style-type: none"> • Safety • Safeguarding • Risk Assessment 	<ul style="list-style-type: none"> • Safety • Safeguarding • Risk Assessment
Premises	
<ul style="list-style-type: none"> • Look after records of ownership of property and equipment • Make sure buildings and equipment are working well • Day to day management • Maintenance • Insurance valuations • Health & safety • Relationship with landlord/owner • Arrange relevant surveys (e.g. asbestos) 	

Trustee Boards	Leadership Team
Governance	Operational
Minibus	
<ul style="list-style-type: none"> • Legislation • Insurance • Maintenance / MOT • day to day management • Driver training 	
Section matters	
	<ul style="list-style-type: none"> • Programme • Moving up • County/District activities and events
Legal matters	
<ul style="list-style-type: none"> • As required • GDPR 	
Equipment	
<ul style="list-style-type: none"> • Requirements • Management • Maintenance 	
Scouts policies & relevant legislation	
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Board management	
<ul style="list-style-type: none"> • Manage appointments to the Board • Keep a record of trustee board meetings, and complete any actions that are agreed • Recruit new trustees • Co-opt trustees onto the board if they need people with particular skills or knowledge • Get expert advice, if needed • Create sub-teams for specific activities, such as finances, if needed 	<ul style="list-style-type: none"> • Manage relevant appointments to the Board • Distribute agendas, minutes, etc. for meetings and AGMs
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<ul style="list-style-type: none"> • act as a responsible employer in accordance with legislation and Scouts values. 	<ul style="list-style-type: none"> • Act as line manager, supporting staff in their work