



Advance  
Union

# TRUSTEE POLICY



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01442 891 122  
[www.advance-union.org](http://www.advance-union.org)



# Advance Union

## TRUSTEE POLICY



### TRUSTEE APPOINTMENT

Trustees are appointed by the NEC as set out in Rule 14 that sets the broad expectations of Trustees.

### KEY DUTIES OF TRUSTEES:

This document outlines the key responsibilities of all Advance Union Trustees and provides practical steps to enable them to fulfil their duties effectively.

### ELIGIBILITY CRITERIA:

To be appointed as an Advance Union Trustee:

- You must follow the procedures, and any restrictions outlined in Advance Union's rules.
- You must not be:
  - Bankrupt (undischarged) or have an Individual Voluntary Arrangement (IVA).
  - Disqualified as a Company Director.
  - Subject to an unspent conviction for certain offences (including those involving dishonesty or deception).

### RESPONSIBLE MANAGEMENT OF ADVANCE UNION'S RESOURCES:

- **Prudence:** Act responsibly, reasonably, transparently and honestly in making all of your decisions.
- **Asset Use:** Ensure that Advance Union's assets are used solely to support or carry out the Union's purposes as a Trades Union.
- **Risk Mitigation:** Avoid exposing Advance Union's assets, finances, beneficiaries or reputation to undue risk.
- **Financial Responsibility:** Do not over-commit Advance Union's resources.
- **Investment and Borrowing:** Exercise caution and seek appropriate professional advice when investing or borrowing.

### REASONABLE CARE AND SKILL:

- **Due Diligence:** Use reasonable care and skill in your role, considering your skills and experience.

- **Time and Effort:** Dedicate sufficient time, thought, and energy to your Trustee responsibilities, including attending and actively participating in Trustee meetings.
- **Authority:** Act within your powers as a Trustee.
- **Good Faith:** Act in good faith and solely in the best interests of Advance Union.
- **Informed Decisions:** Ensure that you are adequately informed before making any decisions and seek professional advice when necessary.
- **Integrity:** If you suspect that any activity breaches the integrity of Advance Union, you have an obligation to report it immediately to both the General Secretary and the NEC.

### ADDITIONAL CONSIDERATIONS:

- **Conflict of Interest:** Declare any potential conflicts of interest and avoid situations

where personal interests may influence your decisions in any transaction or dealings involving Advance Union's assets or finances.

- **Compliance:** Ensure that Advance Union complies with all relevant laws, legislation, regulations and best practices.
- **Transparency:** Maintain clear and comprehensive records and provide transparent information to the General Secretary, the NEC, Advance members and stakeholders. Records include the Minutes of all Trustee meetings.
- **Training:** Attend any appropriate training offered by the Union in order to fulfill these objectives successfully.

By adhering to this Policy, Trustees can effectively manage Advance Union's financial affairs, protect its interests and serve the needs of its members.



Your Voice at Work!

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