



Benevolent Fund of the College of Optometrists & the Association of Optometrists

55 Colchester Road, White Colne, Colchester CO6 2PW

e-mail: admin@opticalbenfund.com

website: www.opticalbenfund.com

Tel: 01787 223800

Desirable skills set for new Trustees

- Compassionate – an understanding of how members of the profession may have lost the ability to finance or care for themselves and their families. How they may need assistance to organise their financial affairs or manage a new set of circumstances. To remember, that whilst they may have the required intellect to qualify and work as an optometrist, they may not possess the life skills to deal with certain situations that they may find stressful or insurmountable.
- Good communication and listening skills – the ability to spend time with beneficiaries and get alongside to understand their circumstances and help them deal with their difficulties. The ability to talk to applicants, beneficiaries and the people who may be able to help them.
- Availability to attend at least 4 meetings per year, the AGM and possibly join a sub-committee
- Time available to devote to Fund business, read e-mail traffic, review documents and respond/contribute accordingly.
- Basic IT skills in order to be able to use e-mails and various Microsoft and Google software applications.
- Willingness to travel in order to visit existing beneficiaries and new applicants, as well as attend meetings which are usually held in London
- A willingness to undergo training
- Experience as AOP/College Councillor or Trustee of another organisation would be useful but by no means essential
- A knowledge of the optometric network leading to an understanding of how the various optometric organisations can work together for the benefit of its professional members
- An awareness of charity legislation as it relates to The Charity Commission, The Inland Revenue and Customs and Excise

The Trustee will be expected to:

- Select, manage and support the Chair
- Set and maintain vision, mission and values
- Develop strategy
- Ensure compliance with the law
- Ensure compliance with governing document
- Ensure accountability
- Maintain proper fiscal oversight
- Ensure accountability
- Establish and monitor policies
- Maintain effective board performance
- Promote the organisation
- Respect the role of staff

This is how the Trustees ensure the efficient running of the charity:

- Trustees act as a single body.
- Trustees ensure the organisation has a clear strategy or set of goals.
- Trustees ensure the work and goals of the organisation are in line with its stated vision, defined in a governing document called the 'Rules'.
- Trustees keep a check on the organisation's finances and activities.
- Trustees appoint and support the head of staff i.e. the Chair
- Trustees delegate authority for day to day activities to appropriate staff.
- Trustees take overall legal responsibility for the organisation's work.
- Trustees must act in the interests of the organisation not themselves.
- Trustees are volunteers and should not, generally, be paid though they should be reimbursed out-of-pocket expenses for their involvement as a trustee.