

## **Paddlers for Life Windermere**

To relieve sickness and protect and preserve good health for persons facing cancer, in particular, but not exclusively breast cancer, or persons in need of rehabilitation as a result of such illness within Cumbria and Lancashire by providing or assisting in the provision for physical activity and recreation, notably Dragon Boating.



### **Trustees' Role and Responsibilities (November 2025)**

See <http://paddlersforlife.co.uk/documents/> for the latest version of all documents

The focus of the Trustees of Paddlers for Life Windermere is to effectively carry out, with the membership's support, the necessary tasks to protect the Charity (CIO) and uphold the Constitution's mandate, spirit and objectives.

#### **General responsibilities of the Trustees**

1. When appointed, your name and required details must be given, as soon as possible by the Secretary, to the Charity Commission. It is imperative that you read and understand the guidance within the Commission's *Charity Trustee Welcome Pack*. If in doubt, always ask – supporting each other is an integral part of being a Trustee. Revisit this guidance throughout your Trusteeship.  
<https://www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3>
2. Read the Paddlers for Life Constitution (plus the CIO Additional Rules & Bye-Laws) and all current Policies which are held on our website. Ensure you understand and implement them, revisit frequently and review appropriately.
3. Ensure you understand any specific responsibilities other Trustees (or named individual(s) with a delegated task) may have, as well as your own.
4. Support, engage with and encourage the membership to ensure they are as fulfilled as possible by Paddlers for Life.
5. Be an active participant in Trustee and membership meetings.
6. Represent Paddlers for Life, as required, within the local and wider community including, but not exclusively, groups related to breast cancer and dragon boat paddling.
7. Ensure that succession planning is in place.
8. Regularly review and update the Paddlers for Life Equipment and Assets Inventory.
9. Ensure smooth transition of responsibilities to new Trustees.

#### **Additional responsibilities of the Chair**

1. To lead, by example, the other Trustees, and support them during their term of office.
2. Ensure that all Trustees (or named individual(s) with a delegated task) understand their role and responsibilities (general and specific).
3. In consultation with fellow Trustees, plan the annual cycle of Pfl meetings (Trustees, AGM, General and, if required, Extraordinary).
4. In consultation with fellow Trustees, specifically the Secretary, prepare the agenda for meetings.
5. Ensure that Policies and general documentation are reviewed regularly and updated if necessary.
6. Chair and facilitate all meetings (or, if unavailable, ensure that another Trustee is available to do so), and monitor that outcomes are implemented.
7. Bring impartiality and objectivity to decision making.
8. Give direction to the Trustees' policy making.

9. Act as spokesperson for the Charity, when appropriate.
10. Liaise with others to keep an overview of the Charity's affairs, equipment and assets, and provide support and/or direction as appropriate.
11. Liaise with others to facilitate necessary change, and to resolve any conflict, within the Charity.
12. Be prepared to delegate, if necessary.

#### **Additional responsibilities of the Treasurer**

1. Maintain an overview of the Charity's affairs, ensuring its current and future financial viability, including appropriate reserves.
2. Ensure that proper financial records and procedures are maintained by implementing/adhering to the procedures outlined in the Paddlers for Life Financial Controls Policy.
3. Ensure that the Charity has appropriate, current insurance cover.
4. Regularly update the Trustees on the Charity's current financial situation.
5. At least annually, lead the review of the effectiveness of the Charity's internal financial controls and update the Policy as necessary.
6. Lead, in consultation with the Chair, on liaising with members on financial matters.
7. Ensure implementation of any recommendations made following appropriate auditing of the accounts.
8. Add all new equipment and asset purchases to the Paddlers for Life Equipment and Assets Inventory.

#### **Additional responsibilities of the Secretary**

Support the Chair by ensuring the smooth functioning of all meetings (Trustee, AGM, General and, if required, Extraordinary), and lines of communication, by

1. Immediately updating all Trustee details on the Charity Commission website
2. Preparing, in consultation with the Chair, Trustees and membership, the agenda for meetings and ensuring that any documentation is circulated in good time (2 weeks before the meeting).
3. Making any necessary meeting arrangements (room bookings, equipment etc).
4. Ensuring that all meetings are quorate (the CIO states that "the quorum for general meetings shall be the greater of 10% or five members") and that all procedures within a meeting are correctly followed.
5. Minuting all meetings and circulating the draft Minutes to all Trustees initially for their comments, and thereafter to the Chair for circulation to the membership.
6. Ensuring that the Chair or membership, as appropriate, has formally approved the Minutes at the subsequent meeting.
7. Ensuring that Trustees or named individual(s) with a delegated task, have carried out tasks agreed at a previous meeting (Trustees, AGM, General or Extraordinary).
8. Ensuring that any relevant correspondence is replied to by the agreed Trustee.
9. Ensuring that appropriate records are kept of the above.

Reviewed/updated: 15.11.25 by Rowena Pryor, Chair PflW

Adopted: 7.12.25

Next review date: November 2026