



STATEMENT OF ROLES AND RESPONSIBILITIES FOR BWY TRUSTEES

Note: this document is subject to periodic review by the Board of Trustees.

THE BRITISH WHEEL OF YOGA

The British Wheel of Yoga (BWY) is an organisation devoted to the study and practice of yoga in the UK. BWY is committed to promoting a greater understanding of yoga and its safe practice through experience, education, study and training, with around 5000 members, consisting of both teachers and non-teaching members. BWY is a company limited by guarantee and a registered charity.

BWY CHARITY OBJECTS

To advance the education of the public in yoga and for that purpose:

- to encourage and help members of the general public to have greater knowledge and understanding of all aspects of yoga and its practice by provision of study, education and training
- to maintain and improve the standard of teaching of yoga by organising teachers training, education and other courses in all aspects of yoga
- to promote research into the methods and effects of all forms of yoga with a view to understanding them more fully and increasing their efficiency
- to fulfil its roles and obligations as the governing body of yoga.

PRINCIPAL DUTIES OF TRUSTEES

The principal duties of all charity trustees are to:

- ensure the charity (trustees, staff, volunteers, and members) complies with the governing documents (Articles of Association), charity law, company law and any other relevant legislation or regulations
- ensure the charity is carrying out its purpose for public benefit and no other purpose, in line with the charitable objects
- act in the charity's best interests, making decisions which will best enable BWY to meet its charitable purpose
- ensure reasonable care when managing the charity's resources, in particular that the charity's resources are only used to achieve the charitable purpose and all contracts, income and expenditure is in line with charity law and the governing document
- ensure the financial stability of the charity.

ELECTION OF TRUSTEES

Trustees are elected through the processes set out in the Articles of Association.

Trustees are elected to serve for a term of a minimum of three years or as otherwise stipulated in the governing document and will be eligible to stand for re-appointment for further terms serving up to a maximum of nine years. Trustees will retire in rotation as set out in the Articles.

Those wishing to serve as a trustee must be legally eligible to serve as both a trustee of a charity and a director of a company. To confirm this, all new or nominated trustees will be required to complete the 'Trustee Eligibility Declaration' prior to appointment.

The role of trustee of the charity is voluntary although reasonable out-of-pocket expenses will be reimbursed in line with the agreed BWY Expenses Policy.

RESPONSIBILITIES OF THE BOARD OF TRUSTEES

The Board of Trustees is responsible for the overall good governance and management of the charity and is accountable to its members and the regulators: the Charity Commission and the Registrar of Companies.

The Board of Trustees will:

- appoint the Chief Executive Officer (CEO) ensuring that they have the necessary skills and abilities to fulfil the role, to include leading the staff team
- set and maintain a framework of delegation and internal controls
- agree and review policies for effective operation and governance of the charity, monitoring their implementation
- develop, agree and monitor the delivery of the strategic plan, including a financial plan, for the achievement of the overall charitable objectives and mission
- receive, scrutinise and analyse regular financial reports and progress information provided by the CEO, treasurer, accountant, auditor or sub-committees of the board
- ensure compliance with annual accounting and reporting requirements
- promote the interests of the charity within a wider network.

In carrying out their role, all trustees will be expected to:

- ensure they give enough time, thought and commitment to the role of being a trustee, for example by preparing for, attending and actively participating in all trustees' meetings
- ensure critical and objective review is applied when making decisions and that the Board of Trustees acts collectively when making decisions
- understand that although board decisions do not have to be unanimous, all trustees must comply with and be responsible for decisions once they are made
- uphold and safeguard the reputation and values of the charity.

TRUSTEE PROFILE

BWY requires a Board of Trustees who can bring a range of skills, knowledge and experience and who collectively will provide effective and responsible governance for the charity, and reach sound decisions which are in the best interest of BWY.

The range of skills and experience includes:

- charity / business management
- finance and financial control processes, systems and accounting
- strategic management and planning
- training and education
- HR including safeguarding, diversity and inclusion
- yoga and its practice.

It is essential that trustees understand the governance and management processes and the boundaries between these. Trustees need to be able to carry out their role diligently and efficiently without becoming either a barrier to progress or over-stepping their responsibilities.

TIME INPUT REQUIRED BY TRUSTEES

It is expected that fulfilling the role of trustee will require the equivalent of a minimum of four hours per month, depending on the role and committee membership.

Trustees are expected to attend four Board meetings, a Financial Planning Workshop and a 24-hour residential Board Retreat.

For further information on the duties of trustees, all trustees are required to read the following:

<https://www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3>