

Roles & Responsibilities Of an EcoSociety TRUST EXCO



*DOORWAY TO OUR
ADVANCEMENT*



Golden Truth
INSTITUTE



RECAP - PHASE IA

(Seeding - Your Executive Committee)

- Patron - ?
- Chairperson – ?
- Co-Chairperson – ?
- President – ?
- Senior Vice President - ?
- Vice President - ?
- Secretary General - ?
- Assistant Secretary - ?
- Treasurer - ?
- Assistant Treasurer - ?
- Members - Seven (7)
- Legal Consultant, Memberships etc

| Role | Jobtitle (jr/med/sen) | Applicant Name |
|--|---|---|
| Do I have the skills? Expectations and skills | Do I have the understanding? Clear tasks and responsibilities | Do I feel like it? Motivation and needs |
| - Skill: Influencing <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | I do that! I am responsible for that! <ul style="list-style-type: none">• Write invoices• Check incoming invoices• Liquid planning• Project controlling (margin)• Bank transfer• Feed accounting• Discuss and adjust insurances• Communication with bank, KSK, tax office, health insurance, employment office...• Travel expenses accounting• cash register• Communication with lawyers• Trademark protection |   <input type="radio"/> I love it! <input type="radio"/> Good thing |
| - Skill: Fundraising Expertise <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | I can decide that! Other Not. • ... |   <input type="radio"/> Boring, Temporarily ok <input type="radio"/> Not my thing! |
| • Skill: Community Network Access <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | | I need help/training for this • ... |
| • Skill: ... <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | | |
| • Skill: ... <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | | |
| LOW OK GOOD BEST | | |

An example of a Roles / Responsibilities exercise



We will show you the standard Through The Golden Door Foundation (TTGDF) structure.

We will make changes to suit the local conditions if necessary.



Roles & Responsibilities of a TRUST Executive Committee

The roles and responsibilities of a Trust Executive Committee can vary depending on local laws and organizational structure created to suit local culture and diversity. However, here are broad roles and responsibilities that members of a Trust Executive Committee shall undertake :

Overall Governance: The Executive Committee shall be responsible for the overall governance and strategic direction of the trust. They set the organization's mission, vision, and strategic goals and also undertake their execution.

Financial Oversight: Ensuring the financial health of the trust is a crucial responsibility. This includes approving budgets, financial reports, and monitoring financial performance.

Policy Development: Developing and reviewing policies and procedures to ensure that the trust operates efficiently, ethically, and in compliance with relevant laws and regulations.

Leadership and Decision-Making: Providing leadership and making key decisions on behalf of the trust. This may involve setting priorities, making strategic choices, and resolving disputes.



Appointment and Oversight of CEO/Executive Director: Selecting, hiring, and evaluating the Chief Executive Officer (CEO) or Executive Director of the trust. Providing guidance and oversight to the CEO to ensure the trust's goals are met.

Fundraising and Resource Development: Playing a role in fundraising efforts, including donor cultivation, grant applications, and capital campaigns to secure the necessary resources for the trust's operations and projects.

Risk Management: Identifying and mitigating risks that could impact the trust's mission and operations. This includes legal, financial, reputational, and operational risks.

Advocacy and Public Relations: Advocating for the trust's mission and promoting its work in the community. Building relationships with stakeholders, including government agencies, community organizations, and donors.

Compliance and Legal Oversight: Ensuring that the trust complies with all applicable laws and regulations. This may involve appointing legal counsel and monitoring legal matters.

Evaluation and Performance Monitoring: Evaluating the trust's programs and initiatives to assess their impact and effectiveness. Using this information to make informed decisions about resource allocation.

Committee Leadership: Overseeing and participating in various committees or subcommittees that focus on specific aspects of the trust's work, such as finance, governance, or program development.



Conflict Resolution: Addressing conflicts of interest and other disputes within the organization in a fair and transparent manner.

Strategic Planning: Engaging in the development and periodic review of the trust's strategic plan, ensuring alignment with the organization's mission and goals.

Ethical Standards: Upholding and promoting ethical standards and best practices within the organization.

Communication with Stakeholders: Maintaining open and effective communication with staff, board members, volunteers, donors, beneficiaries, and the broader community.

Emergency Response and Crisis Management: Developing plans and responses to deal with emergencies, crises, or unexpected events that may impact the trust's operations or reputation.

It's important to note that the specific roles and responsibilities of a Trust Executive Committee may be outlined in the organization's bylaws or governing documents, and they can vary from one trust to another. Additionally, trust executive committees often work closely with other board members, staff, and volunteers to fulfil their duties effectively.



| | | |
|--|--|--|
| Rolle | Jobtitle (jr/med/sen) | Applicant Name |
| Do I have the skills? Expectations and skills | Do I have the understanding? Clear tasks and responsibilities | Do I feel like it? Motivation and needs |
| <p>- Skill: Influencing</p> <div style="border: 1px solid black; height: 20px; width: 100%; position: relative;"> </div> <p>- Skill: Fundraising Expertise</p> <div style="border: 1px solid black; height: 20px; width: 100%; position: relative;"> </div> <p>• Skill: Community Network Access</p> <div style="border: 1px solid black; height: 20px; width: 100%; position: relative;"> </div> <p>• Skill: ...</p> <div style="border: 1px solid black; height: 20px; width: 100%; position: relative;"> </div> <p>• Skill: ...</p> <div style="border: 1px solid black; height: 20px; width: 100%; position: relative;"> </div> <p style="text-align: center;">LOW OK GOOD BEST</p> | <p>I do that! I am responsible for that!</p> <ul style="list-style-type: none"> • Write invoices • Check incoming invoices • Liquid planning • Project controlling (margin) • Bank transfer • Feed accounting • Discuss and adjust insurances • Communication with bank, KSK, tax office, health insurance, employment office... • Travel expenses accounting • cash register • Communication with lawyers • Trademark protection | <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;">  <input type="radio"/> I love it! </div> <div style="text-align: center;">  <input type="radio"/> Good thing </div> </div> <div style="display: flex; justify-content: space-around; margin-top: 20px;"> <div style="text-align: center;">  <input type="radio"/> Boring, Temporarily ok </div> <div style="text-align: center;">  <input type="radio"/> Not my thing! </div> </div> <p>I need help/training for this</p> <p>...</p> |
| | <p>I can decide that! Other Not.</p> <p>• ...</p> | |

Make an assessment with your leadership team.

They should ask themselves :

- 1. Do I have the skills?**
- 2. Do I have the understanding?**
- 3. Do I feel like it?**

An example of a Roles / Responsibilities exercise



PATRON

A Patron in the context of a trust typically serves as a distinguished and often honorary figurehead or supporter of the organization. The role of a Patron can vary depending on the nature and goals of the trust, as well as the expectations of the Patron themselves. Here are some common roles and responsibilities associated with a Patron in a trust:

Symbolic Figurehead: The Patron often serves as a symbolic or ceremonial figurehead of the trust. Their association with the organization can lend prestige and credibility.

Supporter and Advocate: Patrons are typically enthusiastic supporters of the trust's mission and objectives. They may actively promote the trust's work and advocate for its causes within their networks and in the broader community.

Fundraising and Donor Engagement: Patrons may assist in fundraising efforts by leveraging their personal and professional connections to attract donors, sponsors, and supporters. They might host fundraising events, participate in donor meetings, or make financial contributions themselves.

Networking and Relationship Building: Patrons often use their influence and network to connect the trust with potential partners, collaborators, and stakeholders. They can help the organization establish valuable relationships.

Awareness and Public Relations: Patrons can help raise awareness of the trust's mission and activities through their public presence, participation in events, and media appearances. Their endorsement can garner media attention and support for the trust.

Advisory Role: Some Patrons are actively involved in providing advice and guidance to the trust's leadership, such as the Executive Committee or Board of Directors. Their experience and insights can be valuable in strategic planning.



Honorary Titles and Awards: Patrons are often honored with titles or awards in recognition of their support and contributions to the trust. These titles can include "Patron of the Trust" or similar designations.

Attendance at Events: Patrons may attend and participate in key events organized by the trust, such as annual galas, fundraisers, award ceremonies, or public awareness campaigns.

Inspiration and Motivation: Through their commitment and dedication to the trust's mission, Patrons can inspire and motivate the organization's leadership, staff, volunteers, and beneficiaries.

Long-Term Commitment: While some Patrons have a more ceremonial role, others may have a deeper and ongoing commitment to the trust, actively engaging in its activities and initiatives.

It's important to note that the specific role and level of involvement of a Patron can vary widely based on the individual, their availability, and their personal preferences. In some cases, a Patron's involvement may be limited to lending their name and support, while in other cases, they may take on a more active and hands-on role in advancing the trust's mission.

Ultimately, the presence of a Patron can be a significant asset to a trust, providing not only financial support but also credibility and visibility in the community, which can help the trust achieve its goals and make a positive impact.



CHAIR / CO-CHAIR

The role of a Chairman in a Trust is crucial for effective governance and leadership. The Chairman, also known as the Chairperson or Board Chair, typically presides over the Board of Trustees or Directors and plays a pivotal role in guiding the trust toward achieving its mission and objectives. Here are the key roles and responsibilities associated with the Chairman of a Trust:

Leadership: Provide strong and effective leadership to the Board of Trustees and the trust as a whole. This includes setting the tone for board meetings, fostering a collaborative environment, and ensuring the board functions effectively.

Board Governance: Oversee the functioning of the Board, ensuring that it operates in accordance with the trust's bylaws, policies, and applicable laws and regulations. Promote good governance practices.

Strategic Planning: Work with the board, executive committee, and trust leadership to develop and execute the trust's strategic plan. Help define the trust's mission, vision, and long-term goals.

Meeting Facilitation: Preside over board meetings, ensuring that they are productive, well-organized, and focused on key issues. Encourage open and constructive discussion among board members.

Agenda Setting: Collaborate with the CEO or Executive Director and other relevant parties to set the agenda for board meetings. Ensure that the agenda reflects the trust's strategic priorities.

Decision-Making: Guide the board in making informed and sound decisions. Encourage active participation from all board members and ensure that decisions align with the trust's mission and values.

Committee Oversight: Oversee the work of board committees, if applicable. Appoint committee chairs, monitor committee progress, and ensure that committees are fulfilling their responsibilities.



CEO/Executive Director Supervision: Work closely with the CEO or Executive Director, providing support and conducting performance evaluations. Ensure that the CEO is effectively implementing the board's decisions.

Conflict Resolution: Address conflicts within the board or between the board and management in a fair and impartial manner. Seek resolutions that are in the best interest of the trust.

Advocacy and Stakeholder Relations: Represent the trust to external stakeholders, including government agencies, donors, partners, and the public. Advocate for the trust's mission and interests.

Fundraising and Resource Development: Actively participate in fundraising efforts by leveraging personal networks, attending donor meetings, and supporting fundraising campaigns.

Financial Oversight: Collaborate with the Treasurer and finance committee to oversee the trust's financial health, including budget approval and monitoring financial reports.

Performance Evaluation: Lead the board in conducting regular evaluations of its own performance, as well as the performance of the CEO and other key executives.

Succession Planning: Contribute to the identification and development of future board leadership and ensure a smooth transition when the time comes to pass on the role of Chairman.

Compliance and Legal Oversight: Ensure that the trust complies with all applicable laws, regulations, and ethical standards. Seek legal counsel when necessary.

Public Relations: Promote the trust's work and engage with the media and the public to raise awareness of its mission and achievements.

The Chairman of a Trust plays a central role in setting the organization's strategic direction, maintaining effective governance, and ensuring that the trust remains focused on its mission and values. Effective leadership from the Chairman is vital for the success and impact of the trust.



PRESIDENT

The role of the President in a Trust can vary depending on the organization's structure, but in an internationally accepted organizational structure, the President serves as a key leader responsible for overseeing the day-to-day operations and overall management of the trust. Here are the typical roles and responsibilities associated with the position of President in a Trust:

Executive Leadership: As the highest-ranking officer in the trust, the President provides executive leadership and direction for the organization, ensuring that it operates in alignment with its mission, vision, and strategic goals.

Board Relations: The President often works closely with the Board of Trustees or Directors, serving as the primary liaison between the board and the trust's staff. This involves providing regular updates to the board, implementing board decisions, and facilitating communication.

Strategic Planning: Collaborate with the board and other key stakeholders to develop and implement the trust's strategic plan. This includes setting priorities, establishing goals, and developing action plans.

Operational Oversight: Oversee the day-to-day operations of the trust, including program management, administrative functions, and staff management. Ensure that the trust's programs and initiatives are effectively executed.

Team Leadership: Lead and manage the trust's staff, providing direction, support, and supervision. This includes hiring, training, and evaluating staff members.

Financial Management: Work closely with the Treasurer and finance committee to manage the trust's finances. This includes budgeting, financial reporting, and ensuring financial sustainability.

Fundraising and Resource Development: Play a key role in fundraising efforts, including donor cultivation, grant applications, and strategic partnerships. Collaborate with the board and other stakeholders to secure funding.



Advocacy and External Relations: Represent the trust externally to government agencies, donors, partners, and the community. Advocate for the trust's mission and initiatives, and build strong relationships with stakeholders.

Program Development: Lead the development and implementation of programs and initiatives that align with the trust's mission and strategic goals. Ensure that programs are effective and efficient.

Legal and Compliance: Ensure that the trust operates in compliance with all relevant laws, regulations, and ethical standards. Seek legal counsel when necessary.

Communication: Communicate the trust's mission, goals, and achievements to internal and external audiences. Maintain transparency and accountability in all communications.

Performance Evaluation: Collaborate with the board in evaluating the performance of the trust and its programs. Use data and feedback to make improvements and demonstrate impact.

Crisis Management: Be prepared to address and manage crises or unexpected challenges that may arise, including issues related to the trust's reputation or operations.

Succession Planning: Work with the board to develop and implement a succession plan for leadership positions within the trust, including the President's role.

Committee Engagement: Engage with board committees and task forces as needed to support the work of the board and address specific issues or initiatives.

Vision and Innovation: Provide visionary leadership, explore new opportunities, and promote innovation within the trust to advance its mission and respond to changing needs.

The President of a Trust is a critical position responsible for both the strategic and operational aspects of the organization. They are accountable for ensuring the trust's success in fulfilling its mission and serving its beneficiaries effectively.



1st/2nd Vice Presidents

The Vice President y serves as the second-in-command and have to be aware of all the responsibilities discharged by the President, Here are common roles and responsibilities associated with the position of Vice President in a Trust:

Support to the President: The Vice President typically assists and supports the President in their duties. This includes collaborating on strategic planning, decision-making, and overall leadership of the trust.

Leadership in the President's Absence: In the absence of the President, the Vice President may assume the President's responsibilities and authority, ensuring that the trust's operations continue to run smoothly.

Committee Leadership: Often, the Vice President leads or chairs one or more committees within the trust, such as governance, finance, fundraising, or program committees. They oversee committee activities and report back to the Board of Trustees or Directors.

Strategic Planning: Collaborate with the President and the board in the development and implementation of the trust's strategic plan. Contribute to setting goals and priorities.

Board Relations: Build strong relationships with fellow board members, facilitating communication and collaboration among board members and between the board and staff.

Program Oversight: Depending on the trust's structure, the Vice President may have oversight responsibilities for specific programs or initiatives. This can include monitoring program effectiveness, budgeting, and reporting.

Fundraising: Assist in fundraising efforts, including donor cultivation, grant applications, and participation in fundraising campaigns. Engage with donors and supporters to help secure funding for the trust.



Advocacy and External Relations: Represent the trust externally to government agencies, donors, partners, and the community when needed. Advocate for the trust's mission and initiatives.

Legal and Compliance: Ensure that the trust operates in compliance with all relevant laws, regulations, and ethical standards. Seek legal counsel when necessary.

Performance Evaluation: Collaborate with the board and the President in evaluating the trust's performance, including its programs and initiatives. Use data and feedback to make improvements.

Succession Planning: Work with the board and the President to develop and implement a succession plan for leadership positions within the trust, including the Vice President's role.

Special Projects: Take on specific projects or assignments as directed by the President or the board. These projects may be related to strategic goals or addressing particular issues.

Communication: Assist in communication efforts by sharing information about the trust's mission, goals, and achievements with internal and external stakeholders.

Crisis Management: Be prepared to support the President and the board in managing crises or unexpected challenges that may arise, helping to mitigate potential risks to the trust.

Vision and Innovation: Contribute to the trust's vision and explore innovative opportunities to advance its mission and address emerging needs or opportunities.

The role of Vice President in a Trust is often multifaceted and may evolve over time to meet the changing needs of the organization. It is a position of leadership and responsibility, with the Vice President playing a vital role in supporting the President and the board in achieving the trust's mission and objectives.



SECRETARY GENERAL

The Secretary General is the senior executive responsible for the overall management, administration, and leadership of the trust. Here are the key roles and responsibilities associated with the position of Secretary General:

Strategic Leadership: Provide visionary leadership and strategic direction to the trust, working closely with the Board of Trustees or Directors to define and execute the organization's mission and goals.

Operational Oversight: Oversee all day-to-day operations of the trust, including program management, finance, human resources, and administration. Ensure efficient and effective functioning.

Board Relations: Serve as the primary liaison between the Board and the organization, facilitating communication and collaboration. Keep the Board informed of important developments and seek their input on strategic decisions.

Staff Management: Lead and manage the trust's staff, including hiring, training, performance evaluation, and professional development. Foster a positive and inclusive organizational culture.

Strategic Planning: Work with the Board and other stakeholders to develop and implement the trust's strategic plan, setting clear priorities, goals, and action plans.

Financial Management: Oversee the trust's finances, including budgeting, financial reporting, and financial sustainability. Ensure that resources are managed responsibly and in accordance with donor agreements and legal requirements.

Fundraising and Resource Development: Take a lead role in fundraising efforts, including cultivating donors, grant writing, and building partnerships with foundations, corporations, and individual supporters.



Advocacy and Public Relations: Represent the trust to external stakeholders, including government agencies, donors, partners, and the public. Advocate for the trust's mission and initiatives.

Program Development and Management: Oversee the development, implementation, and evaluation of the trust's programs and initiatives. Ensure that programs are aligned with the organization's mission and goals.

Legal and Compliance: Ensure that the trust operates in compliance with all relevant laws, regulations, and ethical standards. Seek legal counsel when necessary.

Risk Management: Identify and mitigate risks that could impact the trust's operations or reputation, and implement risk management strategies.

Performance Evaluation: Regularly assess and report on the trust's performance, using data and feedback to drive improvements and demonstrate impact.

Crisis Management: Be prepared to manage crises or unexpected challenges that may arise, taking appropriate measures to protect the organization and its stakeholders.

Collaboration and Partnership Building: Forge and maintain strategic partnerships with other organizations, government agencies, and stakeholders to advance the trust's mission and objectives.

Transparency and Accountability: Ensure that the trust operates with transparency and accountability, providing regular reports and updates to stakeholders.

Vision and Innovation: Foster innovation within the trust, exploring new opportunities to address emerging needs and challenges.

The Secretary General plays a critical role in guiding the trust toward achieving its mission and ensuring its long-term sustainability. They are responsible for both the strategic direction and the day-to-day operations of the organization, working closely with the Board and other stakeholders to fulfil the trust's mission.



TREASURER

The Treasurer of a trust plays a vital role in managing the financial affairs of the organization. Their responsibilities are crucial for maintaining financial transparency, ensuring compliance with regulations, and safeguarding the trust's assets. Here are the key roles and responsibilities of a Treasurer in a trust:

Financial Oversight: The Treasurer is responsible for overseeing all financial aspects of the trust. They should have a clear understanding of the trust's financial health, including income, expenses, and financial reserves.

Budget Development: Collaborating with the Executive Committee or Board to develop an annual budget that aligns with the trust's strategic goals and objectives. This involves projecting income, allocating resources, and setting financial targets.

Financial Reporting: Providing regular financial reports to the trust's leadership, including the Executive Committee or Board. These reports should include income statements, balance sheets, cash flow statements, and other relevant financial data.

Financial Planning: Working with the leadership team to develop long-term financial plans and strategies to ensure the trust's sustainability and ability to meet its mission.

Investment Management: If the trust has investments, the Treasurer may be responsible for overseeing the investment portfolio, including asset allocation, investment decisions, and monitoring investment performance.

Banking and Cash Management: Managing the trust's bank accounts, including making deposits, authorizing payments, and reconciling bank statements to ensure accuracy and prevent fraud.

Compliance and Legal Requirements: Ensuring that the trust complies with all financial and tax-related regulations, including filing tax returns, maintaining tax-exempt status (if applicable), and adhering to any financial reporting requirements.



Audit and Financial Review: Coordinating with external auditors or financial reviewers to conduct annual audits or reviews of the trust's financial statements. This helps maintain transparency and accountability.

Internal Controls: Implementing and maintaining internal controls to safeguard the trust's assets and prevent financial mismanagement or fraud.

Financial Policy Development: Developing and updating financial policies and procedures to ensure sound financial management practices within the trust.

Fundraising Support: Collaborating with the fundraising committee or team to provide financial data and reports needed for grant applications, donor stewardship, and fundraising campaigns.

Cash Flow Management: Managing the trust's cash flow to ensure that it has the necessary funds to meet its financial obligations and fulfill its mission.

Risk Management: Identifying and mitigating financial risks that could impact the trust's financial stability, such as changes in funding sources or unexpected expenses.

Treasury Operations: Managing treasury operations, including investments, liquidity management, and banking relationships.
Communication: Providing financial updates and reports to the trust's stakeholders, including the Executive Committee, Board, and donors, as needed.

Continual Learning and Training: Staying informed about best practices in nonprofit financial management and compliance with relevant laws and regulations.

The Treasurer is a critical member of the trust's leadership team, and their expertise in financial matters is essential for the trust's long-term sustainability and success. It's important for the Treasurer to work closely with other members of the Executive Committee, board members, and staff to ensure effective financial management and transparency.



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14 min video :

<https://youtu.be/LFXW-zilwP0?si=9z-VBjZjSfTEjZ2V>