



Trustee Information Pack

Welcome from our Co-Chairs

We sincerely appreciate your interest in becoming a member of our governing body, the Board of Trustees. We are looking to appoint one new trustee.

Founded in 1919 by businessman and philanthropist, Sir Richard Stapley (1843-1920), our endowed trust is an independent grantmaking charity exclusively dedicated to improving access to postgraduate education. Currently, we do this by supporting excellent academic students experiencing financial or other barriers to pursuing their studies. For more information about the Trust and the difference our grants make please see our website, www.stapleytrust.org

We are a modest, unincorporated charitable trust with a UK-wide remit.

Currently, we have 9 trustees. We do not have an office, but employ one part-time, home-based Administrator who manages the day-to-day running of the charity in line with trustees' decisions. Our Board meets three times a year, either in London or by video conference call. We have one annual grant round starting each January and distribute approximately £160,000 in grants to individual students each year. Assessing and scoring grant applications each spring is one of the core responsibilities of all our trustees.

This is an exciting time to join the Trust. We celebrated our 100th anniversary in 2019 and we are highly respected within our grant-making niche. We have a strategic plan covering the period to the end of 2026. We have an excellent Trustee Board and staff support, a strong asset base, well-developed policies and procedures, and an achievable but ambitious strategic plan.

This is an unremunerated, non-executive role. All our Trustees are volunteers and therefore unpaid, but we cover travel and other expenses.

We are looking for new trustees to build on our success and to bring fresh thinking and experience to our Board so that we can achieve even greater impact. We encourage you to consider applying. Below in this pack you will find the role description, person specification and how to apply.

We eagerly anticipate your application! The closing date for CVs with cover letters is 12 noon on Wednesday 8th October. Interviews for shortlisted candidates will be held by video conference call on 24th October. Thank you once again!

Dr Manali Chitre and Dr Debbie Marsden
Co-Chairs of The Sir Richard Stapley Educational Trust

CONTENTS:

- A: BACKGROUND INFORMATION ABOUT THE SIR RICHARD STAPLEY EDUCATIONAL TRUST
- B BACKGROUND INFORMATION ABOUT ACTING AS A TRUSTEE
- C: TRUSTEE ROLE DESCRIPTION
- D: TRUSTEE PERSON SPECIFICATION
- E: DATES OF REMAINING TRUSTEE BOARD MEETINGS IN 2025
- F: HOW TO APPLY

A: BACKGROUND INFORMATION ABOUT THE SIR RICHARD STAPLEY EDUCATIONAL TRUST

Sir Richard Stapley was a British businessman, politician and philanthropist active in the late 1800s - early 1900s. Not having had a university education himself, he was keen to enable others to do so, and more generally to promote educational achievement.

The endowment from Sir Richard is currently valued at approximately £4m. We do not spend this endowment but use the income from it to cover our grant-making and running costs. We also receive income each year from individual donors. We keep our running costs low.

In November 2019, we celebrated our centenary. The Trust has helped countless students over the last hundred years. Today remains an expression of Sir Richard's lifelong concern to advance educational and philanthropic causes.

The Trust exists to promote education and currently provides modest grants to support postgraduate students in any subject, as well as courses in medicine, veterinary sciences and dentistry taken as a second degree. The Trust is governed by a Board of Trustees:

Dr Manali Chitre (Co-Chair)
Dr Debra Ann Marsden (Co-Chair)
Mr Peter Taaffe (Treasurer)
Mr William Glover
Dr James Jones
Dr John Kirkland OBE
Dr Claire Mera-Nelson
Mr Hugh Smith
Mr Paul Trimmer

We are a modest, unincorporated charitable trust with a UK-wide remit. Legal advice about the extent of risk was obtained, and governance of other trusts explored. In July 2021, the Trustee Board took a well-informed and well-deliberated decision not to incorporate. Being unincorporated means our trustees are potentially personally liable for any liabilities of the Trust that cannot be met from the Trust's assets. As most of the Trust's assets are investments and its main activity is grant-making, the legal advice we received was that the risk of the trustees incurring personal liability is low. Many grant-making trusts remain unincorporated for this reason.

Grant-making:

The award of a grant depends on the independent assessment of three trustees, based on the applicant's previous academic record, statements and academic reference. The criteria for awarding grants are academic achievement and the relevance of the proposed course of study to the applicant's career goals and/or personal development. The amount of the grant is based on the applicant's financial need.

In 2025, the Trust awarded 131 grants, totaling over £160,000. A wide variety of different subject areas were supported, with medicine attracting the greatest number of grants. Each year, the Trust conducts a survey to help us evaluate our effectiveness as a grant maker.

For further information about the Trust, please see our website, www.stapleytrust.org

B: BACKGROUND INFORMATION ABOUT ACTING AS A TRUSTEE

This section contains information about who can and cannot become a charity trustee, and about the legal responsibilities of charity trustees.

Some people are disqualified by law from acting as charity trustees, including anyone aged under 18, those convicted of an offence involving deception or dishonesty, unless the conviction is spent, and anyone who is an undischarged bankrupt. You can find out more about a who is disqualified [here](#).

Prospective trustees should consider whether there would be any possible conflicts of interest if they were to be appointed as a trustee. This is particularly important where personal interests may make it difficult for the individual concerned to make a full contribution to the trustees' discussions and decisions.

What are the legal responsibilities of trustees?

This section contains extracts from The Good Trustee Guide published by the National Council for Voluntary Organisation (NCVO).

Charity trustees are responsible for controlling the management and administration of the charity. This means that trustees are ultimately responsible for everything the charity does and how it does it. Their overriding duty is to act in good faith, that is, in the belief that what they are doing is correct, within charity law. In addition, they must make sure that the charity pursues its aims, as set out in its governing document, uses its assets exclusively to pursue those aims, and acts in the interests of its beneficiaries. They must act personally (i.e., take an active part) in the best interests of the charity, avoid conflict with their own personal interests and must not profit from their trusteeship.

Charity law

Under charity law, all trustees must be eligible for trusteeship, must act in the best interests of the charity, and must follow the Charity Commission's disclosure, reporting and accounting requirements. They must keep within the law on trading, political activities and fundraising.

What standards would you have to meet as a trustee?

Trustees are expected to act reasonably and prudently in all matters relating to the charity and in its long-term interests. They must act with the same degree of care as a prudent person of business would exercise in the management of his or her own affairs or those of someone else for whom they had responsibility. In practice, this means that they need to know about the legal, financial and managerial issues affecting the charity, although they are not expected to have expert knowledge. If they state that they have expertise in a given area, however, they will be expected to act with a higher duty of care.

What happens if a trustee disagrees with his or her fellow trustees?

Trustees are 'jointly and severally' responsible for the activities of the charity and must act together. No trustee acting alone can bind his or her fellow trustees, unless specifically authorised to do so. However, the Board's decisions do not have to be unanimous. Therefore, the majority binds the minority, and you would be bound by the decisions of your fellow trustees even if you were absent from a meeting.

What are 'charitable Objects'?

The governing document of the charity sets out its aims or 'Objects', that is, the purpose of the organisation.

Trustees have a duty to act within the objects of the charity, and to apply the charity's assets exclusively to pursue those objects. It is a breach of trust to undertake any activities which lie outside the objects.

What are the trustees' responsibilities for the charity's assets?

Trustees have a duty to protect all the assets belonging to the charity, by ensuring that there are adequate financial controls and that any land or buildings the charity owns are well maintained and insured.

C: TRUSTEE ROLE DESCRIPTION

We anticipate that the time commitment required would be roughly 2 days per quarter year.

The responsibilities of our trustees are:

- To ensure good governance of the Trust, ensuring that it complies with its governing document charity law, and any other relevant legislation or regulations
- To ensure that the Trust pursues its charitable Objects as defined in its governing document
- To ensure that the Trust applies its resources exclusively in pursuance of its Objects
- To contribute actively to the Board's role of giving firm strategic direction to the Trust, setting overall policy, defining goals, setting targets and evaluating performance against agreed targets
- To safeguard the reputation and values of the Trust
- To ensure the financial stability of the Trust
- To protect and manage the assets of the Trust and to ensure the proper investment of its funds
- To appoint the Administrator and ensure that his/her performance is monitored – supporting, motivating and constructively challenging as appropriate
- In addition to the above statutory duties, each trustee should use any specific knowledge or experience s/he may have to help the Board reach sound decisions. This may involve reviewing board papers, facilitating discussions, focusing on key issues, providing advice and guidance on new initiatives, or other issues in which the trustee has special expertise
- To participate in the assessment and scoring of grant applications each spring
- To participate in winning support for the Trust, including financial support.

D: TRUSTEE PERSON SPECIFICATION

The person specification is a picture of the skills, knowledge and experience needed to carry out the role. It is used in both short listing and interview processes.

Essential (each of the 10 points below):

1. A commitment to the Trust's mission of improving access to postgraduate education for talented students experiencing financial or other barriers to pursuing their studies
2. Eligible to serve as a trustee, and able and willing to devote the necessary time
3. An understanding and acceptance of the legal duties, responsibilities and liabilities of trusteeship
4. Strategic vision and experience of strategic planning
5. Good, independent judgement
6. An ability to think creatively
7. A willingness to express their views openly
8. An ability to work effectively as a member of a team
9. Adherence to Nolan's seven principles of public life: selflessness, integrity, objectivity, accountability, openness, honesty and leadership
10. Knowledge of postgraduate education in the UK.

Desirable (any of 4 points below):

11. Experience of having served as a charity trustee, particularly in an education-related charity
12. Proven experience of working within the Further Education sector

E. DATES OF REMAINING BOARD OF TRUSTEES MEETING IN 2025:

Monday 17 November 10.00 – 13.30 in person, in central London, followed by lunch.

F: HOW TO APPLY

Please apply by emailing us your tailored CV (max. 2 sides of A4) along with a covering letter (max. 2 sides A4) setting out how you fulfil the person specification in Section E above. In your letter, please tell us how you became aware of the trustee vacancy.

Please note that CVs alone will not be considered.

The closing date is 12 noon on Wednesday 8th October 2025. Applications must reach admin@stapleytrust.org by email by the closing date and time.

A shortlist of candidates will be invited for online interview on **Friday 24th October 2025**.

We welcome applications from all sections of the community and seek to maintain a diverse Board. We are particularly interested in hearing from those who have previously received grants from the Trust.

If you have any questions about the role, please email admin@stapleytrust.org

Thank you once again for your interest!