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THE TRUST  
PARTNERSHIP

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Proposals to The Triangle Trust

# We are a specialist organisation providing a range of services for charitable trusts

- A flexible approach that can incorporate all working practices of both established and new trusts and foundations
- We support foundations with consulting, interim staffing and ongoing services to ensure business continuity
- Unique 'shared services' infrastructure for administration combined with expert Clerks and Consultants
- Specialist trust, grant making and financial management expertise
- The Trust Partnership is a B Corporation, a registered social enterprise that meets the highest standards of social and environmental performance, transparency and accountability
- We help clients reduce costs and improve efficiency, with no retainer fees and shared office facilities charged at cost



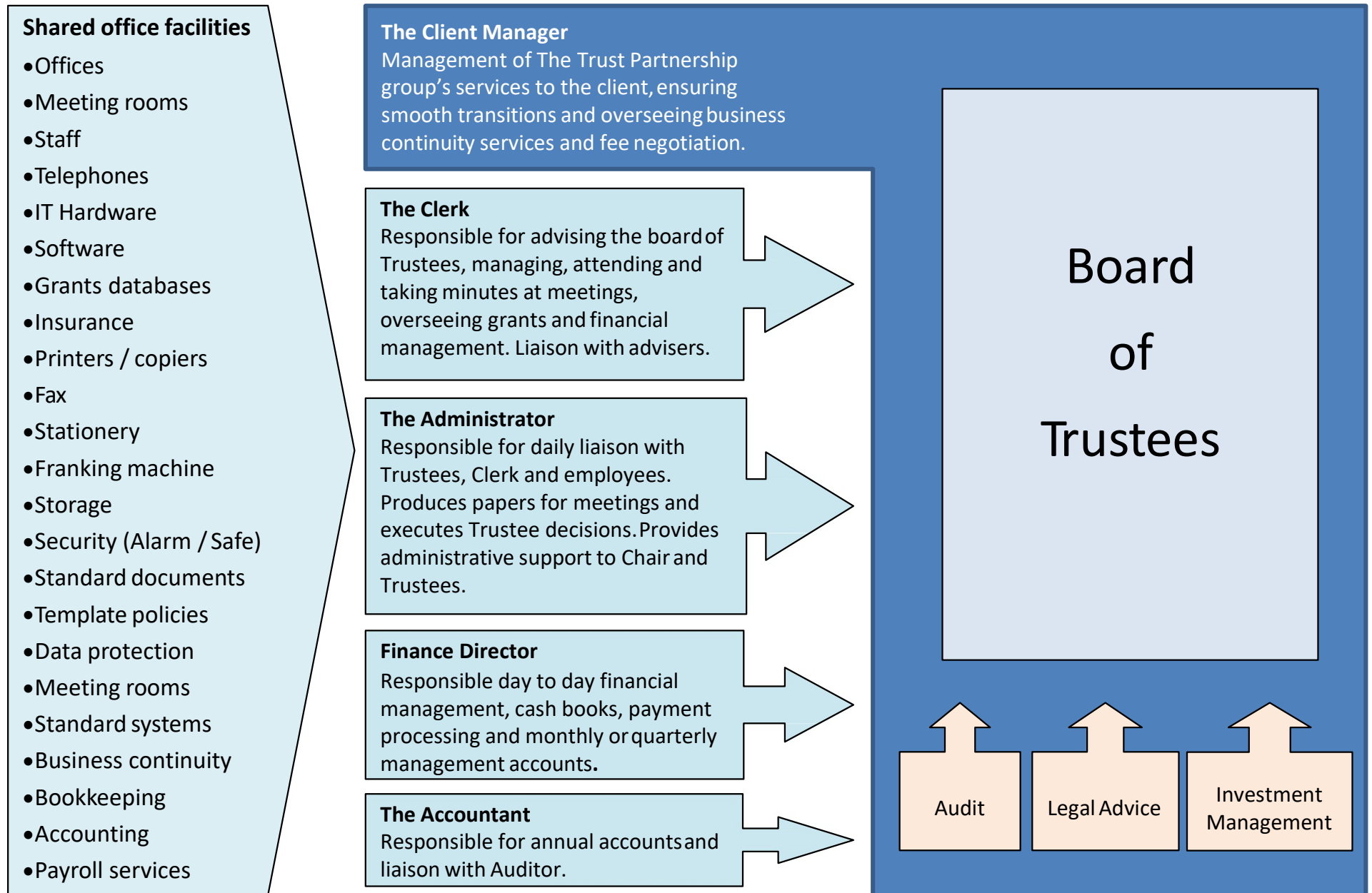
# Expertise and Services

Since 2005 our experience of delivering quality services to clients has enabled us to build a team of highly skilled employees, partners and associates across a range of disciplines. The organisation advises clients in:

- Charity registration
- Governance, policies and regulatory best practice
- Grantmaking strategy and execution
- Database design and build
- Online grant applications processes
- Investment
- Web design
- IT support



# Team Working and Shared Services



# Excellence in administration

- Our experienced team of Clerks and Administrators are based London, the South West and South East.
- Our Gloucestershire office acts as the registered office for clients, managing all incoming mail, e-mail and telephone calls
- Our administrators are responsible for the day to day affairs of more than 40 clients, including correspondence, information management and diary management
- Document storage, IT support and meeting facilities are all available through our shared services infrastructure



# Bookkeeping & Accounting

Clerks and administrators are supported by a team of expert bookkeepers and accountants:

- Management accounts and full financial administration
- Annual Trustees' report and accounts
- Liaison with Auditors, Bankers and Investment Managers
- Accurate and timely statutory returns



# Governance and Effectiveness

- Excellent board administration (i.e. timely, informative and ordered papers) produces good board decision making
- Our expert Clerks reduce the burden of work on Trustees and provide them with best practice on policies and procedures. The Clerk arranges, attends and minutes Trustee meetings
- Clear procedures, policies and reporting processes enable Trustees to reduce time commitments and improve governance
- The Clerk liaises with key stakeholders and partners, professional service suppliers, including lawyers and investment managers



# Business Continuity

- We ensure that all processes, policies and procedures are documented in a comprehensive operations manual, so that in the event of a change to the administration, a smooth transition can be achieved
- Our business continuity plan limits the impact of unforeseen disasters or disruptions
- The Trust Partnership can manage staff recruitment and transition on behalf of Trustees who retain the final decision
- The size of our team ensures that sickness or temporary absence does not interrupt service
- Our IT partners (Jireh Solutions) provide appropriate data storage and recovery systems





# The Trust Partnership Team

**Benjamin Janes**  
*Founder and Chief Executive*



Benjamin has worked with charities and companies supporting charitable activities since 1991. After a career in fundraising he founded The Trust Partnership in 2005 to provide expert management, administration and accounting support for independent grant making trusts. He advises clients on the strategic development of their organisations.

Benjamin is a Trustee of the Irish Online Giving Foundation and the Australian Online Giving Foundation.



# The Trust Partnership Team

**Noel Cooper**  
*Finance Director*



Noel has more than 20 years experience of working in an operational and managerial capacity for a series of educational publishers supplying Primary and Secondary schools based in the UK and overseas.

Having trained with the Chartered Institute of Management Accountants, Noel brings his experience in company financial controls, business management and systems development. He coordinates all accounting functions for The Trust Partnership and its clients.



# The Trust and Foundation Team

**Elizabeth Fathi**  
*Client Director*



Elizabeth has worked in the charity sector for 16 years primarily as a Chief Executive with additional experience as both Chair and Trustee of a variety of charities, family trusts and community-led organisations.

Governance and compliance has been central to Elizabeth's work and she has acted as a mentor and advisor to many organisations who have looked to meet those regulations in a relevant and proportionate way.

Elizabeth is Chair of the Almshouse Association.



# The Trust and Foundation Team

**Mia Duddridge**  
*Trust & Foundation Manager*



Mia has many years of hands-on experience in the delivery of grant-making programmes for charitable trusts.

As well as being the senior administrator in our Gloucestershire based team, Mia is Clerk to the Trustees of The Nightingale Fellowship, 1930 Fund for District Nurse's and The Wixamtree Trust, where her sensitive care of vulnerable applicants is invaluable.

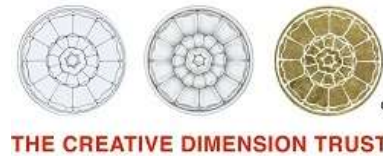


# Clients

The Trust Partnership serves more than 40 clients including:



John Coates Charitable Trust



The D'Oyly Carte Charitable Trust





## Testimonials

*“We moved the administration of the Foundation to The Trust Partnership a few years ago, and we have been impressed and relieved at the way they have taken over, with sensitivity, the handling of a varied portfolio of grants. They have worked easily with others who are involved, and taken over the burden of the financial administration, so that the Trustees can concentrate on what they are there to do, to fulfil the purposes of the Foundation.”* **Martyn Gowar**, The Ashley Family Foundation

*“The Trust Partnership has proved exactly the right administrative partner for our small but fiercely proud membership organisation containing two charities. Sensitivity, expertise and efficiency characterise The Trust Partnership’s professional service which has relieved us of an ever increasing administrative burden borne by a few volunteers. We are now free to concentrate on the fellowship that matters so much to our membership.”* **Sue Norman**, President Emeritus, The Nightingale Fellowship

*“The Trust Partnership administers all aspects of this charity’s affairs, provides full secretariat support to the Trustees, initially assesses grant applications and liaises with assessors to aid them in reaching their decisions. We’ve been delighted with the service received. They have been extremely efficient and friendly and always respond to questions promptly. We’re very pleased that we made the decision to move our business to them.”*

**Kieron Lynch**, Chairman, 1930 Fund for District Nurses





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