

Research and Development Forum Trustee Role Description

ROLE TITLE:	Trustee, Research and Development Forum
LAST UPDATED:	July 2026
REACH:	Research and Development Forum Community Wide

Context

The Research and Development Forum was founded as a registered Charitable Incorporated Organisation (CIO) with the Charity Commission for England and Wales in June 2020 (Registration Number: 1189876).

The CIO's objects are to advance education and learning in research and development for the health and care community across England, Scotland, Wales, and Northern Ireland. This creates public benefit by improving the quality and effectiveness of health and care research.

The Board of Trustees, acting within its statutory duties and an agreed Compact, is responsible for delivering the charitable objects through education, advocacy and connectivity across the research and development system.

Main purpose of the role

In relation to the statutory duties, the Charity Commission identifies 6 main duties of CIO Trustees:

- Ensuring that the CIO is carrying out its purposes for the public benefit.
- Complying with the CIO's document and the law.
- Acting in the CIO's best interests.
- Managing the CIO's resources responsibly.
- Acting with reasonable care and skill.
- Ensuring that the CIO is accountable.

Through the adoption of self-reflection, assessment, and critical review of skills, underpinned by a commitment to equity, diversity and inclusion, the Board of Trustees will ensure delivery of its purpose and statutory duties and improve the quality and effectiveness of health and social care research.

Role and support in CIO

Accountable to:	The Chair of Trustees
Liases with:	Trustees, Research and Development Forum community, stakeholders within health and care research, The Charity Commission
Works with a Team of:	Trustees of the CIO
Remuneration:	The role is voluntary

Key responsibilities

- To keep up to date with and fully informed about strategic issues and changes to the wider health and care research environment affecting the CIO.
 - To develop the CIO to increase its efficiency, effectiveness, and relevance to its key stakeholders across England, Scotland, Wales, and Northern Ireland.
 - To work with the Trustees to ensure that the CIO has maximum impact for its beneficiaries.
 - To ensure that the CIO and its representatives' function properly within the legal and regulatory framework, and in line with the governing documents and accepted best practice.
 - To ensure that decisions consider the views of all stakeholders.
 - Work with the Trustees in the development of policies and strategic plans for the CIO, which take account of the external environment and ensure its long-term future as a relevant and sustainable organisation.
 - To use any specific skills, knowledge, or experience to enhance the CIO's effectiveness and efficiency and to identify and manage risk appropriately
-

General duties of a Trustee of the CIO

- To discharge the duties of Trustees in a way that adds to the public and community confidence and trust in the CIO.
 - To act as an ambassador for the CIO, promoting and raising awareness of its role, activities and objectives.
 - To ensure that the CIO continuously works towards the delivery of its mission and vision.
 - To act in the best interests of the CIO, beneficiaries, and future beneficiaries at all times.
 - To support oversight of the financial sustainability of the CIO, including the Charity Commission annual return.
 - To prepare for meetings by reviewing papers in advance and contributing constructively to discussion.
 - To maintain confidentiality about all sensitive/confidential information received in the course of a Trustee's responsibilities to the CIO.
 - To declare and appropriately manage any actual, potential or perceived conflicts of interest in accordance with the CIO's policies.
-

General qualities and experience required of a Trustee

Experience:

- An extensive understanding of the health and care research landscape and the systems which operate within it.
- Strong track record of achievement with an extensive background of working in health and care research.
- Demonstrable commitment, either in a current or previous role, to the activities of the CIO.
- Demonstrable experience of providing guidance to senior leaders and to working collaboratively in developing strategy, performance monitoring and delivering an ambitious agenda.
- Successful leadership of, or participation in, organisational change (desirable).
- Trustee or similar role in the Voluntary, Charity and Social Enterprise sector (desirable).

Research and Development Forum

Knowledge and skills:

- Sound understanding of the principles of good governance.
- Proven ability to act strategically, able to prioritise effectively and focus on matters of maximum impact.
- Ability to communicate views and experience in a way that adds insight to Trustee discussion.
- Listening, influencing, and consensus-building skills.
- Ability to build positive and respectful relationships.
- Ability to deal simultaneously with multiple and complex issues.
- Ability to operate effectively as part of a team to ensure the CIO meets its legal and regulatory duties as well as its purpose.

Attributes:

- Alignment with the CIOs mission, vision, and values.
- Commitment to Nolan's seven principles of public life (selflessness, integrity, objectivity, accountability, openness, honesty, and leadership) and the CIO Compact.
- A commitment to enhancing equity, diversity, and inclusion.
- Meet the Charity Commission criteria for being a Trustee.

Terms of appointment

Appointment and Timescales:

- The term of office is three years. This can be renewed for a maximum three terms (nine years).
- Any reappointment for a fourth consecutive term would be by unanimous exceptional agreement by the remaining Trustees for an agreed time period due to the specific skills, knowledge and experience held by that Trustee.

Location, Time Commitment and Expenses:

- The role is home based.
- The post is voluntary and unpaid, but all out of pocket expenses related to the role will be reimbursed in line with the CIO's expenses policy.
- The role will involve some travel and possible overnight trips as part of our ongoing stakeholder engagement activity.
- Trustees meet for 60-90 minutes online each month, with diary invites sent a year in advance. It is the expectation that Trustees attend a minimum of 7 of meetings per annum.
- Trustees meet the Working Group Chairs/Co-chairs online once a quarter for 90 minutes, with diary invites sent a year in advance. It is the expectation that Trustees attend a minimum of 2 meetings per annum.
- Attendance at the annual Research and Development Forum Conference is expected, with costs associated with it covered by the CIO.
- There may be a requirement for Trustees to meet in person once a year. Such meetings will be notified well in advance and provision made for online attendance if required. Costs associated with in-person meetings will be covered by the CIO.
- There may be additional demand upon appointment for induction.

Recruitment and selection process:

- Applications will be reviewed to determine that candidates meet the person criteria and essential qualities and experience for the role before any invite to interview.

Research and Development Forum

- Recruitment to the role is by invitation of the CIO Chair of Trustees and approval of the CIO Board of Trustees.
- References will be requested and taken up.

The CIO recognises the enormous benefits and social justice imperatives of a diverse organisation at every level. We actively and warmly encourage applications from a broad range of backgrounds and experiences within the Research and Development Forum community.

Research and Development Forum Charity Number 1189876