

Trustee Recruitment Toolkit

The purpose of this toolkit is to provide information and advice that will support your organisation to recruit, select, appoint and induct new Trustees. The aim is to positively influence how effective the charity is in the future through achieving a balanced Board and a well governed charity.

The majority of Trustees are recruited through close personal and professional connections. Yet they do not necessarily reflect the future needs of the organisation or the beneficiaries and it is rare to identify a diverse, independent and effective board through this approach.

A high performing Trustee Board requires a combination of many different assets, including:

- Robust structure
- Clear roles and responsibilities
- Good quality processes and administration
- A capable Chair
- An appropriate and diverse skill set
- Openness to discussion
- Strong decision making
- An effective and open relationship with the Chief Executive

The Trustee Recruitment Process

Success will be dependent on both preparation and investment in the recruitment of new Board members. Follow these simple steps to ensure the organisation is fully prepared to recruit new board members and follow the link below for a template Trustee Recruitment Timetable:

<http://www.supporthub.org.uk/resources/trustee-recruitment-timetable>

Step One: Identification of the need for new Trustees as a result of Trustees resigning or the need for new skills and experience.

Step Two: A skills audit will identify the skills you already have and at the same time identify any gaps that may exist. This information will help in creating short role descriptions and person specifications.

<http://www.supporthub.org.uk/resources/management-committee-skills-audit>

Step Three: Set a timetable for recruitment and identify who is going to be involved, the budget available and key dates in the process. While it is likely that aspects of the work will be delegated, the entire Board will be involved in both the recruitment process and decisions.

<http://www.supporthub.org.uk/resources/trustee-recruitment-timetable>

Step Four: To ensure the organisation meets its legal responsibilities and operates within any restrictions that may exist, refer to the governing document. For further information on the role of Trustees see the Charity Commission website <http://www.charitycommission.gov.uk/trustees-staff-and-volunteers/trustee-role/becoming-a-trustee/>

Step Five: Attracting a diverse range of the candidates your organisation needs requires an investment of time in networking. If you require additional support there are a number of organisations that offer free help with charity recruitment:

- Trustee Finder is a service provided by the Small Charities Coalition offers free online advertising for general trustee vacancies and links to the Do-it volunteering database <http://www.smallcharities.org.uk/trustee-finder>
- Do-it is the national volunteering database where people can find local volunteering opportunities www.do-it.org.uk
- The Reach Matching Service gives non-profit organisations the chance to recruit external trustees through their register of skilled volunteers <http://www.reachskills.org.uk/trusteeworks-matching-service>
- Arts and Business helps arts organisations through its business connections to find trustees <http://artsandbusiness.bitc.org.uk/arts/board-bank>
- The NCVO TrusteeBank offers a free online notice board advertising trustee vacancies www.ncvo-vol.org.uk
- The Institute of Chartered Accountants for England and Wales offers charities a free access to its members' jobs board www.icaewjobs.com This service is automatically offered by Trusteeworks for financial trustee positions.

Step Six: Develop an information pack to give to potential trustees, including a role description, covering the duties of a charity trustee and the specific skills and experience being sought; an outline of the organisation and its priorities for the next 2-5 years; how to apply for the role and details on the appointments process being used.

Step Seven: Use agreed criteria to short list and interview potential Trustees. Key points to note are to standardise the process, to ensure objectivity and to keep accurate notes to support the decision making process. Select a point of contact to respond to enquiries and ensure that unsuccessful candidates are thanked for their interest. Where possible offer them other opportunities to engage with the Charity through, for example: joining an existing Sub-Committee, volunteering, supporting events, supporting the charity with a regular donation. Store information on the skills and time the unsuccessful candidates offer in an easily accessible place.

Step Eight: Develop an induction pack to welcome your new Trustee to the organisation. The information in the pack needs to cover everything the new Trustee will require, including:

- Organisation's governing documents
- Copy of the latest annual report and accounts
- The statement of Trustee liability
- Details on the frequency/timings of board meetings and committees

- Minutes of previous year's board meetings
- List of current trustees plus short biographies
- Organisational structure and senior staff biographies
- Background history of the organisation
- The current strategy/operating plans
- Income Generation Strategy, outlining key funders and project funding status
- Outline of key stakeholder relationships
- Information about trustee training and development
- Policy documents including:
 - Expenses policy
 - Conflict of interest declaration
 - Volunteering policy

Step Nine: When inviting your chosen Trustee to join the board, make it clear that the appointment is subject to references and agreed attendance at trustee meetings and fulfilling other responsibilities of the role. Arrange for them to visit the organisation and meet key individuals; register their appointment with the Charity Commission if appropriate; use the opportunity to communicate by issuing a press release.

Step Ten: Review the process for recruiting your new trustee. What worked well, could have worked better? Assess how effectively the new Board member has integrated into the organisation and whether their skills and expertise are being used effectively.

Where Next...

The Recruiting Trustees Step by Step Plan offers further information and a timetable to guide you through the process of recruiting a new Trustee. Once your new Trustee is recruited there is an opportunity to continue to develop your Board, here are some opportunities to consider:

Voscur deliver a quarterly **Trustee Network** meeting – this is a themed evening event that offers a great opportunity for Trustees to network and learn from each others experiences. See the Voscur training pages for details:

<http://www.supporthub.org.uk/upcoming-support-hub-events-and-training>

Trustees' Week

Trustees' Week takes place once a year in November, it showcases the great work that trustees do and highlights trusteeship opportunities for people from all walks of life to get involved and make a difference. The Trustees' Week website <http://trusteesweek.blogspot.co.uk/> is regularly updated with news and information throughout the year.

More Resources:

If your organisation needs further support take a look at the resources below or contact Voscur on **0117 909 9949**

There are many other resources on the Support Hub website:

<http://www.supporthub.org.uk/resources>

Relevant keywords to look at include:

Recruitment <http://www.supporthub.org.uk/resources/keywords/recruitment>

Trustees <http://www.supporthub.org.uk/resources/keywords/trustees-and-committees>

Other resources published on the internet include:

Recruit a Trustee Pocket Guide

<http://www.reachskills.org.uk/file/recruitatrusteepocketguide-pdf>

Trustee Recruitment Toolkit

<http://www.reachskills.org.uk/file/trustee-recruitment-toolkit-pdf-pdf>

The Essential Trustee – what you need to know

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

Finding New Trustees – what charities need to know

<https://www.gov.uk/government/publications/finding-new-trustees-cc30>

New Trustee Declaration of Eligibility

<https://www.gov.uk/government/publications/confirmation-of-charity-trustee-eligibility>

Skills Audit and Skills Register

<http://www.reachskills.org.uk/file/a-simple-skills-audit-pdf>

Induction Planner

<http://www.reachskills.org.uk/file/recruitment-dwnld-induction-planner-pdf>

Induction Pack Checklist

<http://www.reachskills.org.uk/file/recruitment-induction-pack-checklist-pdf>