

# Trustee Recruitment and Induction

Central London Trustee Network  
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# Finding the right trustees

## Stage 1: Plan

- Prepare the Board
  - Skills assessment

### **Exercise: Understanding Skills**

What are your skills?

In your current Board role, what skills do you use?



# Finding the right trustees

## Stage 1: Plan

- Prepare the Board
  - Skills assessment
  - Encouraging diversity
  - Desire for change vs. impact of change
  - Legal position
    - guidelines set by your governing documents
    - how many trustees can you have?
    - recruitment/election procedures
    - who can and can not be a trustee?



# Finding the right trustees

## Stage 2: Recruit

- Prepare
  - What is your budget?

### **Exercise: Value vs. cost**

How much would you invest to find the right trustee?

How much value have you added in your role as trustee?

# Finding the right trustees

## Stage 2: Recruit

- Prepare
  - What is your budget?
  - Information pack
    - Role description
      - duties of trustee / specific skills and experience
    - about the organisation
    - how to apply
    - how trustees will be appointed
  - Your shortlist and interview criteria
  - Your induction process



# Finding the right trustees

## Stage 2: Recruit

- Promote the vacancy
  - How will you reach the people you want?

### **Exercise: ‘Help (I need somebody ...)’**

How have you recruited trustees in the past?

What benefits/limitations did your approach have?

What might an ‘open recruitment process’ look like for your organisation?



# Finding the right trustees

## Stage 2: Recruit

- Promote the vacancy
  - word of mouth; local and national advertising
  - on-line promotion (e.g. your own website; trusteefinder)
  - voluntary sector brokerage service (e.g. Reach)
  - commercial recruitment agency
- Select your trustee
  - reviewing applications
  - meeting prospective trustees
    - interview or informal discussion
    - selling your organisation



# Finding the right trustees

## Stage 2: Recruit

- Joining the Board
  - take up references
  - visiting the organisation, meeting the people
  - observer at a Board meeting
  - formal appointment
  - don't forget the paperwork
  - making the most of the appointment
    - press release
    - induction and review with new trustee



# Finding the right trustees

## Stage 3: Induction

- Welcome the new trustee
- Arrange Induction Programme
- Consider a mentor/buddy
- Support available to trustees



# Finding the right trustees

## Stage 4: Review

- Review the process
  - what worked well, what could have worked better?
  - Do the Board, new trustee and staff perspectives differ?
  - What will you change next time?



# Finding the right trustees

## Case Study: Reach Volunteering

- Governing document
- Strategic direction
- A trustee for Scotland
- Recruiting a new Chair
- Recruiting the Treasurer
- Our next trustee recruitment
- The cost



# Finding the right trustees

## Helping you recruit

- Useful Resources Handout
- Look at examples
  - third sector magazine
  - evening standard free ads
  - other charity websites
- [www.trusteenet.org.uk](http://www.trusteenet.org.uk)
- [www.reachskills.org.uk](http://www.reachskills.org.uk)

