

Toolkit

Finding the right people:

Strategic Trustee and Volunteer Recruitment

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1 Introduction

CTA has created this trustee recruitment toolkit to support Community Transport Operators (CT's) that may be struggling to find and recruit new trustees or directors, or where recruitment has been identified as a way to secure particular skill sets and knowledge needed on the committee board. Although the emphasis of this toolkit is on trustees, the same structured approach can be utilised to improve your volunteer recruitment, extending your reach and helping engage people with the qualities and attributes that your organisation needs.

The approach outlined in this toolkit offers a step by step process in the development of a recruitment campaign, how to maximise the benefits once you have identified suitable candidates and ways to improve trustee or volunteer retention.

We recognise that some organisations may be tempted to short cut some of the steps set out in this toolkit, however it is important to recognise that an investment of time and energy into running a good recruitment campaign will yield substantial benefits for your CT in the longer term.

1.1 The Board

Community and voluntary organisations come in many forms, from small unincorporated associations, Charities, Charitable Incorporated Organisations (CIO), Not for Profit Companies, Cooperatives, Community Interest Companies (CIC), Friendly Societies, Mutuels and more. Irrespective of the form your organisation takes, you will undoubtedly have some form of Management Committee or Board of Trustees/Directors and the effectiveness of your board will have a direct impact upon the success of your organisation. For further guidance, see CTA advice leaflet: [Constitution - Legal Structures](#).

Therefore, finding the right people to create an effective and cohesive board is essential if your organisation is going to survive and thrive.

However, every community organisation knows how difficult it can be to find the right kind of people to sit on the board and these difficulties can stem from one or more areas:

- Finding people with the right skill sets and knowledge.
- Finding people with the right attitude.
- People are wary of the legal responsibilities.
- People are time poor and unable to find the time to help.
- Relies on feel good factor rather than a financial incentive - i.e. its voluntary

Unsurprisingly, it can be a tall order to find people who can bring the right balance of skills and knowledge, a good attitude, an acceptance of being legally accountable and on top of all that, be willing to offer their time and effort for free!

This toolkit will help you to fully assess your current board arrangements and find ways to reinforce your position through a targeted recruitment process.

1.2 Instructions for the use of this toolkit

There are slight differences between the legal role of a trustee and director, although these differences do not affect the methods you can use to recruit people onto your board. Therefore, for simplicity, where differences do exist between director and trustee roles, these will be clearly stated in the toolkit, otherwise the term trustee will be used to mean trustee or director. It is also worth noting that trustees and directors are still volunteers and so the process set out in this toolkit could be adapted for a general volunteer recruitment campaign to fill other roles within your organisation.

This toolkit is comprised of background information to help you understand the reasons behind the actions required, coupled with clear action points that will help you create a pre-planned trustee recruitment campaign that is tailored to your situation and the needs of the organisation. The action points (highlighted in green boxes) are linked to resources in the appendix, including a planning table and additional tools and templates.

By following the instructions step by step, you will be able to complete the planning table which in turn will help you complete a clear action plan for delivery.

Should you require any assistance or support in implementing any of the steps described in this toolkit, please contact CTA. If you require support and additional training with governance, contact:

- www.ncvo.org.uk
- <https://scvo.org.uk>
- www.nicva.org/about-us
- www.wcva.org.uk/home

2 Getting to grips with the basics

Committee boards are an essential aspect of any community/voluntary organisation. The committee might be called a board of trustees, board of directors or even just a Management Group, but their purpose and function is the same - to take overall responsibility for the organisation and control what it does; a function often referred to as governance.

Many organisations fail to provide a thorough induction for new trustees and so it isn't unusual to have trustees who don't have a solid grasp on what the board is for and the legal accountability they have as a trustee or director. Therefore, before we go any further, let's look at some of the fundamental principles about being a trustee on the board of a CT operator.

2.1 What is Governance and why is it important?

At its most basic level, a board of trustees provides governance. This means that the trustees are collectively responsible for controlling (or governing) what happens in the organisation. Legal compliance is the central pillar of governance, ensuring that the organisation is fulfilling all of its legal obligations, from company or charity law, to health and safety, insurance, employment law and so on. Compliance with these legal obligations is usually achieved through a range of policies and procedures that set out what an organisation will do and how. The board must enforce such policies as required and receive regular reports from staff or volunteers so that they are able to make informed decisions.

The 'Governing Document' of an organisation (e.g. Constitution or Memorandum and Articles of Association) sets out the powers and additional responsibilities of the board (in line with Charity or Company law) and it is important to recognise that these can vary between organisations. The board should constantly refer to their governing document to ensure they are carrying out their duties appropriately.

Most importantly, when it comes to community organisations, the board do not (normally) own the organisation; their role is akin to being custodians, carrying out their function on behalf of the wider membership. It is for this reason that elections of new trustees occur during an AGM, offering a democratic process that offers collective power to the membership of the organisation.

2.2 The legal responsibilities of the Trustee/Director

Fundamentally, the board is ultimately accountable for everything that happens in an organisation and so every member of a board needs to make decisions that are considered and defensible.

There are some differences between being a trustee or a director when it comes to legal responsibility and accountability:

- The term Director is usually applied to someone who sits on the board of a Company (i.e. Company Limited by Guarantee, Company Limited by Shares, CIC, Industrial Provident Society). These type of organisations are termed incorporated and often have the term 'Limited' in the organisation name, meaning there is limited liability. Incorporation of an organisation offers a degree of protection for directors because a 'Limited' company has a separate legal identity. In other words, the company is recognised by law as if it were a person and so any legal proceedings (e.g. being sued for a broken contract) are directed at the company and not the individual people who form the board of directors. However, if the directors have broken the law in some way (referred to as a Tort) such as being neglectful of their responsibilities, then the protection of limited liability no longer applies and individual directors can still find themselves liable to prosecution, even if they were not directly involved in an incident.

- The term Trustee is applied to Charities. A registered charity does not have limited liability (unless it has converted to the new Charitable Incorporated Organisation). Therefore, trustees of registered charities are 'jointly and severally liable' meaning that all trustees are equally liable for the actions of the charity. Without incorporation, there is no limited liability and therefore a charity has no separate legal identity in the eyes of the law (unless it is a CIO). This means that a charity cannot take on contracts in its own name; instead contracts and leases are usually held with an individual on the board. The exposure of trustees to these legal risks and liabilities was part of the reason for the introduction of the Charitable Incorporated Organisation (CIO) in 2013, providing the protections of incorporation for charities. However, a charity must formally convert into a CIO if it wishes to gain the legal protection available under this legal structure.

Trustees and directors need to be aware of their legal responsibilities (and potential liabilities) so that they can be encouraged to play an active role in decision making. Being 'jointly and severally liable' means that a trustee can be held liable, even if they didn't voice an opinion when a decision was made.

Conflicts of Interest

When a personal interest of a trustee overlaps with the activities of a charity (or those of a director within the company), this is known as a conflict of interest. Trustees have a legal responsibility to make decisions in the best interests of the charity, so when a conflict of interest arises, the organisation must have clear procedures and policies regarding how potential conflicts of interest will be identified and managed.

Any organisation that does not have a clear and effective Conflicts of Interest Policy could have all its decision making processes called into question (and at worst face an investigation by the Charity Commission). Conflicts of Interest are inevitable at some point and aren't a problem, so long as trustees realise that divulging such conflicts is essential.

Trustees must regularly declare personal interests that might conflict with charity business (e.g. their employment, links with other organisations, family ties etc), however they must also be aware that

some conflicts of interest are not immediately apparent and so continual diligence is required. Where a conflict of interest is identified, the trustees concerned are usually excluded from discussions and decision making on the issue to demonstrate they have not had any influence on the decisions made.

2.3 What makes a good Trustee?

The answer to this can vary because it depends upon the organisation, their activities, the organisational culture and more. However, there are some fundamental characteristics that you would hope to find in any trustee:

- Interest and enthusiasm for what the organisation is trying to achieve;
- Motivation;
- Commitment;
- Skills and/or knowledge relevant to the organisation;
- Curiosity and a willingness to ask questions, no matter how obvious or potentially unpopular;
- Active involvement;
- Critical friend

2.4 What makes an effective Committee Board?

Having trustees with appropriate skills and knowledge on your board is great, but this does not automatically create a good committee board.

Effective meetings need structure and there needs to be effective communication in place between all levels of the organisation so that trustees are in a position to make decisions based on accurate information. It is important to allow time at board meetings for catch up's and discussions, but also push the agenda forward and develop clear and appropriate actions in response to any matters arising.

Distributing an agenda and other relevant papers one week before a meeting will give trustees an opportunity to prepare in advance of a meeting, to read and consider papers that are to be discussed, resulting in more effective decision making. Providing papers and figures at the start of a meeting will not allow sufficient deliberation and can lead to bad decision making.

The Chair has a key role in setting the pace of meetings and encouraging all trustees to state an opinion. The Chair has a responsibility to focus the board's attention and direct proceedings, but it should be remembered that overall control of the organisation resides with the board as a whole. Therefore, a Chair cannot veto any action if all the other trustees democratically agree on a particular course of action.

Many boards tend to leave all financial matters to the appointed Treasurer of the organisation. Whilst the Treasurer does have a key role in overseeing the finances of an organisation, the most effective boards are those where all trustees recognise that they have a duty to examine and question the organisation's financial position. Admittedly, it is the scrutiny of financial information that many trustees find daunting, but this shouldn't be an excuse for financial reports to go unquestioned. It is a good idea to arrange some support/training for all trustees to help improve the level of financial management.

Ideally the board should reflect the social make-up of the community being served. The more diverse the board, the better its decision making will be, which by association is more likely to create an effective and thriving organisation.

An effective board not only helps the organisation fulfil its legal obligations, but will improve the achievement of social/charitable objectives and commitments. The expectations of the board under charity law are:

- Ensuring the charity complies with charity law, the charity's own governing document, and other relevant legislation (e.g. employment law, health and safety etc);
- Acting with integrity, avoiding conflicts of interest and misuse of funds;
- Ensuring the charity remains solvent, and exercising prudence when investing the charity's money or borrowing on its behalf;
- Using the charity's funds and assets responsibly to further the charity's aims, without exposing them to undue risk;
- Using reasonable care and skill in their work, seeking professional advice where appropriate.

2.5 The challenge and barriers of finding trustees and directors

The issues of finding and recruiting good trustees and directors are not unique, however many issues can be overcome (or at least minimised) with some consideration and additional effort. This toolkit will help guide some of your thinking processes around some of the most common problems associated with trustee recruitment.

Whilst you may initially believe that your problem is only one of finding new trustees, it is important to take a wider view of how your board operates to better understand the kind of issues you may be facing and through this develop appropriate solutions. Finding potential trustees is only part of the solution and the methods you use to integrate new trustees into the board can play a significant role in whether trustee recruitment helps or hinders the effectiveness of your board.

Here are some common problems which committee boards face and some suggested actions that could potentially create solutions:

Issue:	Can't find the right kind of people?
<i>Potential Solution</i>	<ul style="list-style-type: none"> • Be clear on what the right kind of person is - skills, knowledge, experience • Develop a targeted approach for communications to reach these people

Issue:	Potential trustees have other time pressures and so are less inclined/able to volunteer as a result
<i>Potential Solution</i>	<ul style="list-style-type: none"> • Clarify what the average time commitment is for current trustees • Would changing the usual date and time of board meetings help?

Issue:	Many potential volunteers don't see themselves as trustee material because they don't fully understand the role
<i>Potential Solution</i>	<ul style="list-style-type: none"> • Work to engage more with the wider community • Hold some 'meet the trustee' events • Ensure publicity is suited to your target audience

Issue:	Potential trustees don't recognise the benefits they gain through such a role and so are reluctant to get involved
<i>Potential Solution</i>	<ul style="list-style-type: none"> Formalise (and make known), the benefits people gain as trustees e.g. training and development package, social dimension, feel good factor etc

Issue:	Potential trustees feel they have too many 'conflicts of interest' to be able to fulfil the role adequately
<i>Potential Solution</i>	<ul style="list-style-type: none"> Ensure you have a robust and fit for purpose conflicts of interest policy and procedure

Issue:	Existing trustees are passive, allowing all the work to sit on the shoulders of one or two people, making it hard to attract new people
<i>Potential Solution</i>	<ul style="list-style-type: none"> Allocate clear roles and responsibilities with agreed expectations Ensure everyone understands their individual legal responsibility Make sure recruitment of trustees emphasises 'active' involvement

Issue:	Struggle to retain trustees
<i>Potential Solution</i>	<ul style="list-style-type: none"> Identify the underlying reasons why trustees leave Find ways to address these problems – is it to do with recruiting the wrong people, or is there a deep-rooted issue with the organisational culture? Will previous trustees return to the board to bring about these changes?

Issue:	Low public opinion
<i>Potential Solution</i>	<ul style="list-style-type: none"> If public opinion of your organisation is negative, you will definitely struggle to get trustees. If you find yourself in this situation, you will first have to address how your organisation is perceived, or at least show that you want to be better and need new trustees to help you get there.

3 Recruiting Trustees – the toolkit

Currently, few organisations consider a planned trustee recruitment campaign and instead rely on approaching people already known to the organisation. Whilst this approach can yield results, over time the pool of potential trustees can shrink to the point you have nobody left to ask. The process described in this toolkit is focussed on extending the reach of organisations beyond the pool of known individuals, to attract individuals with the kind of skills, knowledge and characteristics that will be an asset to the board. If your governing document states that trustees must be elected from among the membership, this doesn't usually prevent you extending your search beyond the membership, but prospective trustees will need to sign up as members before they can be appointed.

A structured recruitment campaign can bring substantial benefits, but it's advisable to recognise that an influx of new trustees creates change and this can occasionally cause issues of its own. You should therefore ensure the process is well-planned and well-managed. Following the steps set out in this toolkit should minimise the potential of any problems, but being aware of the pros and cons associated with a recruitment campaign will help you introduce safeguards and ensure the process isn't derailed by unexpected surprises.

Pros of recruitment campaign	Cons of recruitment campaign
More informed discussion	Additional time needed
Improved decision making	Potential for clashes in personality
Improved effectiveness	Potential resentment among existing trustees
Better management	No guarantee of successful appointments
Renewed energy and vigour	Balancing opposing opinions
Better engagement	
More equitable sharing of responsibilities	
Extended networks and influence	
Reduce skill and knowledge gaps	
Improved confidence of funders	
Greater impact of organisational aims	

In the appendix of this toolkit you will find a planning template. Completing this table as you progress through the following steps will result in a recruitment plan so that everyone is clear on what needs to be done and why.

Spending time in planning the entire process before you begin taking action, including how you will support newly appointed trustees, will help ensure everyone in the organisation knows what you are doing and why. Full and thorough planning will also create a positive impression to applicants because they are more likely to perceive your organisation as well organised and something they would like to be a part of.

Therefore, when using this toolkit, **ensure you have planned out all the steps BEFORE you take any action** in advertising and promoting your trustee vacancies.

3.1 Identifying what the Board needs

Step 1 - Get agreement of the Board

The current board might agree that more trustees are needed, but do they fully understand the reasons why? Every trustee should read through this toolkit and then have an opportunity to raise any concerns. The board should discuss if they are ready to commit to a strategic and structured trustee recruitment campaign and set out what they want to achieve by the end of it. Having a clear shared vision of how you want to improve the current board is important, because it will become the guiding principal behind every action you take.

What problems have you experienced in recruiting and retaining trustees? Before moving forward, you will need to identify if there are any organisational changes required in order to create favourable conditions that will make your organisation attractive to potential volunteers. In other words, why would someone join your organisation instead of another community organisation?

ACTION 1: Using the planning template (see [appendix A](#)):

- List the reasons why you need to undertake a trustee recruitment campaign.
- What problems have you encountered in the past with regards to recruiting/retaining new trustees? How will you overcome these problems?

Step 2 - Clarify the needs

Before taking any action, you need to answer a few basic questions in order to decide on the best way forward:

- What kind of people you are looking for?
- How many vacant places are there on your board?
- What skills and knowledge would be beneficial?
- How can you encourage diversity on your board?

ACTION 2: Check your governing document and add the following information to the planning template:

- The maximum number of trustees for your board?
- How many trustees can you co-opt onto the board?
- The process of appointing new trustees (either through co-opting or at a General Meeting)
- From the above - how many new trustees are you seeking to appoint in this campaign?

Skills and knowledge analysis

A useful exercise at this stage is to conduct a skills and knowledge analysis of the current board. To be clear, the purpose of such an analysis is to identify where skill gaps exist and should not become a test of who knows more! Complete honesty about the current skills and knowledge of your current trustees is vitally important if this exercise is to be productive. Be aware that some trustees may feel they don't contribute anything but this is unlikely to be the truth of the matter; trustees should help and support each other to recognise the role and skills they bring to the board. This can also be used to clearly define different roles on the board to help improve board cohesion and function.

Using the skills and knowledge analysis provided in [appendix B](#), all trustees should be involved in the following process:

1. Collectively look at the list of skills and knowledge in [appendix B](#).
2. Add in any additional skill or knowledge areas that you feel aren't listed.
3. Give every trustee a copy of the table to individually complete columns 2 and 3.
4. Collect completed tables together and calculate the average score (column 2) of each skill and knowledge area. The average score will enable you to rank each skill and knowledge based on its importance and relevance to your particular board.
5. Any skill areas with an average score of 3 or above should ideally be on your board.
6. Using the information in column 3, you can now identify which skills and knowledge are already present on your board (column 3), which skills existing trustees would be prepared to undergo training for and what skills are missing that could be secured through a trustee recruitment campaign.

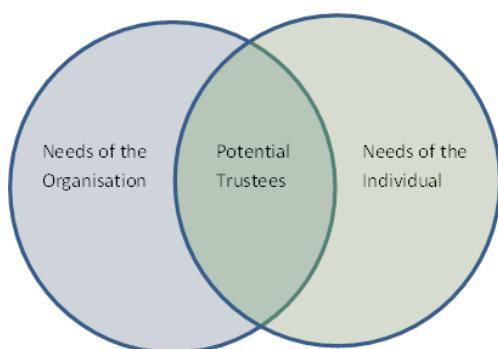
ACTION 3:

- Conduct a skills analysis of the current board using the template for the 'skills and knowledge assessment for the board' in [appendix B](#).
- From the information collected, transfer all the skill and knowledge gaps you've identified into the planning template (appendix A).

Step 3 – Defining your offer

Trustee recruitment is a two-sided transaction. In other words, there are particular things you will be seeking in any potential trustee, however the potential trustees will also have expectations of your organisation and what they want to gain from becoming a trustee.

The overlap between the needs of the organisation and the needs of an individual is where we find potential trustees i.e. they have something to offer as well as something to gain.



Recognising this interdependent relationship is important and will help improve the quality of applications you receive. Therefore, you will need to define the benefits of being a trustee, in addition to developing a person specification for the kind of people you are seeking as trustees.

When considering the benefits of being a trustee, make sure they are legitimate benefits. If a new trustee does not feel they are gaining the benefits you stated, they may consider looking for another organisation that can give them the skills and experience they are seeking.

ACTION 4: In the planning template ([appendix A](#)), list the benefits you can offer to anyone becoming a trustee. E.g. training opportunities, skills in community development, business development etc

Personality and character traits also play a significant role in how well your board works and so should not be overlooked. You should try to define what kind of people you are looking for; whether it's an energetic, single minded 'go getter' or a restrained considerate thoughtful individual. You may also want to consider the diversity of your board and if there are any under-represented groups. Boards that reflect the same diversity as the communities they serve ensure that the views and opinions of all sectors of the community are considered. Diversity therefore supports better decision making in developing community services.

ACTION 5: List some keywords that encapsulate the background, character traits and personality of the people you are seeking as a trustee and add them to the planning template ([appendix A](#)).

The Person Specification

Once you have completed the above actions, you will be in a position to create an outline person specification for potential trustees. In this way, you enable potential applicants to identify if they might be interested and suited to the roles available. The specification will also communicate that you are an organised board with a clear view of what you need, making your vacancy more appealing to prospective trustees compared to another organisation that simply states they are looking for trustees.

The person specification should include the important details such as the desired skill and knowledge areas sought, the character traits and what your organisation can offer in return. Some care is needed because you do not want to be too prescriptive as this will dissuade some people, but you still need to be clear about what your organisation needs.

An example person specification is included in [appendix C](#) and can be adapted to suit your needs as appropriate.

ACTION 6: Write a person specification for new trustees based on the identified skill and knowledge gaps, desired character traits and what benefits you can offer to prospective trustees. An example is included in the [appendix C](#).

(Pay careful attention to the type of language you use in writing the specification so that it will appeal to the type of people you hope will respond. (You will find the audience segmentation exercise in section 3.2.1 might help with this).

3.2 Planning how you will reach and engage your target audience

Now you have defined the kind of people you are looking for and what the organisation can offer in return, you need to consider and plan how you will manage the entire recruitment process, including how you will support the integration of new trustees onto the board. Planning ahead is important because it will enable you to introduce the appropriate steps at the right time in order get the most from your recruitment process and find the best candidates that you can.

The process you follow needs to identify:

- Communication channels that will let people know about your trustee positions
- A clear, simple but effective application process
- How you will get to know applicants and provide an opportunity for applicants to get to know you
- How you will select the most appropriate trustees from the applicants
- An induction process and how you will support (and if necessary train) new trustees

3.2.1 Marketing and Advertising

Quite often, organisations will advertise wherever they can think of. However, such a random, scattergun approach is extremely unlikely to yield the results you may be hoping for. Don't forget there are loads of other organisations seeking trustees as well and so you need to try and reach and appeal to potential trustees in a way that makes them respond to your advert over a different organisation.

The advertising of your vacancies needs to be sharply focussed, considering the kind of people you are looking for and then identifying which forms of communication are most likely to reach them. For example, if you were looking for someone with good knowledge of accountancy, you're likely to get a better selection of candidates by reaching out to colleges or universities running accounting courses than from a poster in a shop window.

In order to reach the kind of people you are seeking as trustees, you need to develop a strategy that will optimise response rates among people that most closely meet the person specification you have developed. You will need to identify what forms of communication will work best, where to advertise and the kind of language you use in the advert. If you get this right, the kind of people you're trying to reach will recognise themselves in the advert you produce and will be more likely to contact you.

1. Where should you advertise?

Based on your person specification, the skills and characteristics of people you are seeking as trustees, brainstorm some ideas for where these kind of people might exist (try to think in wider terms as some skills exist in unlikely places). For example:

- Financial knowledge: Banks, accountants, solicitors, insurance firms
- Transport knowledge: Garages, local authority, bus companies
- Project Management skills: Building firms, local authority, Corporations
- Conflict resolution: Parents, Counsellors, Teachers

2. Communication Channels

Once you have begun to characterise where you might find the skills and knowledge you're seeking, how might you best communicate with these audiences? For example:

- Online platforms - discussion groups, LinkedIn, Facebook, company intranets
- Publications - special interest magazines, newspapers, newsletters, posters
- Interest groups - clubs, societies, events, conferences
- Direct approaches - telephone, email, face to face, letters



3. Capturing interest

Once you've identified the best places and communication channels, you need to think about people's behaviour, attitudes, needs and values. These very personal characteristics strongly influence whether someone will take an interest in something or totally ignore it. Therefore, consider the list of keywords you developed for the character and personality traits of the people you are looking to be trustees and then consider the kind of language and graphics that might appeal to them. Try to think from the perspective of the people you will be approaching and select words and phrases that are most likely to align with their needs and values and 'hook' their interest.

The driving consideration in the development of your advert should be the type of people you are trying to appeal to and what their motivations and interests might be in considering a trustee position. Therefore, the language and images you use should feed into the character and personality traits you've already identified. There are two example adverts in appendix E that illustrate this point, one targeted at the local community and one for corporations or large businesses.

Be aware that when people see your advert, you need something that will encourage them to read it. Then, once they've read it, you need to find a way to prompt them to take action and respond. There is an element of psychology involved in developing an advert, best demonstrated by the images below.

Given the two images below - which organisation would you prefer to be a part of?

	
<p>This is a positive image that creates a sense of empowerment and community. It creates a sense of fulfilment gained through being part of something bigger than yourself and has a clear instruction for its audience.</p>	<p>This image is also seeking assistance but could be interpreted as desperation. There is a sense of loneliness conveyed in this image which could appeal to a maternal instinct but could equally be perceived as a dependency that makes people think twice about stepping forward.</p>

1. Other Considerations

When to advertise can also play a large role in the success of your campaign. For example, your advert will probably reach fewer people in July and August due to people being away on holiday. In January, people might be more inclined to consider volunteering as part of a New Year resolution. Timing your advert with Trustees Week in November could give your campaign an added boost, especially if your advert emphasises this point.

3.2.2 Applications and enquiries

Before you begin advertising, make sure you have planned and agreed the rest of the process. Everyone in the organisation needs to be clear on the process that will be followed once your advertising goes live.

Application pack

Prepare an application pack that can be sent out to those who respond to the advert, including:

- Details of the organisation
- General information about the role
- Person specification (created in section 3.1)
- Guidance on how to apply/application form
- Any other relevant information
- Deadline for submission

Think carefully about how rigorous you want your application process to be. You don't want it to be too demanding, but equally you need to gain information from applicants to be able to decide on their suitability. Ideally you want information that goes beyond their employment history and qualifications to reveal more about their motivations. You may just ask people to submit a CV, complete a simple application form or just write a personal statement (or a combination).

Whatever method you use, the key information you want to obtain is:

- Who they are?
- Why they are interested?
- What they feel they can offer to the role?

ACTION 8: In the planning template ([appendix A](#)):

- How will people apply? Make sure relevant details are included in any advertising.
- List the documents you will include in the application pack. Create the application pack ready to be sent out by post and/or made available online (e-mail or download from website)

Roles and Responsibilities during application process

Before your campaign swings into action, it is important to assign responsibilities for different actions. Hopefully, once your advert begins to reach people, you will begin to get enquiries and requests for further information. It is essential that any contact you receive about the trustee vacancies is responded to promptly! Nothing puts off a potential trustee quicker than feeling like the organisation has ignored them.

- Who will respond to informal enquiries?
- Who will send out application packs in response to requests?
- Who will send confirmation of receipt for applications from prospective trustees?
- Will initial applications be shortlisted and if so, on what basis and by whom?
- Who will ensure applicants are invited to attend the informal social (see next section)?

ACTION 9: In the planning template ([appendix A](#)):

- Clarify the roles and responsibilities of your organisation and staff during the application process.

3.2.3 Getting to know applicants

You'll need to decide what you'll do to get to know applicants and give them a chance to get to know you. Some organisations might want to employ a formal interview process, however the suitability of this approach will vary depending on your circumstances and current level of operation. For the majority of community transport operators, holding an informal social event can be a much better way of meeting your applicants. In this way you can bring together all the existing trustees and applicants in a low pressure environment, enabling everyone to get better acquainted.

The kind of event you hold is entirely up to you, but it should include some kind of fun activity as an icebreaker and provide an opportunity for trustees to mix and talk freely with applicants. The event should also include more details about the organisation and what the trustee role will involve in addition to giving applicants the chance to ask questions.

Remember this event gives your current trustees an opportunity to find out more about the applicants and consider how well they meet the needs of your organisation. However, this event is also for applicants to get a better feel for the organisation and the current trustees, in order to decide if they are interested in becoming a trustee. Therefore, the culture of your organisation will be on full display; if your board is insular, cold, negative about the problems you face, or unwelcoming, then nobody will consider becoming a trustee and all your hard work to engage potential trustees will be wasted. Make sure you put your best foot forward and be open and receptive to any comments or input from the applicants. Pay particular attention to any 'shy' applicants because you don't want to overlook anyone and shyness or low confidence could hide some exceptional skills and knowledge that your organisation needs.

By the end of the event it will be useful to get applicants to state if they are still interested in being a trustee or if they have changed their mind. This can be conducted as a 1:1 discussion or the completion of a simple form. If they have changed their mind, ensure you include a question that asks them to explain why because the answer might reveal an underlying issue that your board needs to address in order to secure more trustees.

ACTION 10: Plan an informal social event that applicants and trustees will attend. Set a date and time and plan a rough agenda to create a balance of formal and informal activities. Your event should include:

- A fun icebreaker to make everyone feel included and to reveal a little more about each other
- Information about the organisation, its objectives and activities
- Opportunity for applicants and trustees to chat informally
- Existing trustee's viewpoint - about the organisation and what it's like to be a trustee
- Applicant's viewpoint – why they're interested in the role
- Q&A session
- Expression of interest to continue or withdraw from consideration as a trustee

If required, a template for the event that can be adapted to your needs is contained in [appendix F](#).

3.2.4 Shortlisting and Selection

What to do after the 'getting to know you' step will depend upon many things, the size of your organisation, the number of trustee vacancies, the skill gaps you have identified and so on. Ultimately, the board will need to set some time aside to have a discussion and agree which applicants you are prepared to make an offer to. You should be very aware of equalities legislation at this point and ensure the decision making process is firmly rooted in a fair assessment of candidates based upon the person specification developed in section 3.1.

For some organisations, particularly small ones, the application process and informal social event may be sufficient to reach a consensus. However, if you have a large number of applicants and a limited number of positions, you may want to conduct an additional shortlisting process followed by a slightly more formal interview process – once more, ensuring you use consistent criteria to reach a decision in line with the Equalities Act 2010.

Another option for shortlisting and final selection is to invite all the applicants to a board meeting. In this way it can provide a flavour of what the role involves and help you assess the working dynamic between potential and existing trustees.

ACTION 11: Decide in advance if you are likely to need an additional step for shortlisting and selecting candidates and detail the method and criteria to achieve this. List these steps in the planning template ([appendix A](#)).

Don't look a gift horse in the mouth

By following the recruitment campaign set out in this toolkit, you might find yourself in a position where you have more applicants than vacancies. Should this situation arise, you can give yourselves a pat on the back for conducting a great recruitment campaign. Now that you have engaged all these people, the last thing you will want to do is turn anyone away who has skills or knowledge that can benefit the organisation, especially if you've encountered difficulties in trustee recruitment in the past.

Therefore, assuming you do have applicants that you can't appoint (for no other reason than insufficient vacancies), consider how else you can make use of what they have to offer. For example, working groups are a great way to support the work of the board and are frequently comprised of a mix of trustees and non-trustees. If you don't already have working groups established in your organisation, this could be a good opportunity to set one up, first of all it will help drive forward the work of the board and secondly offer a way to retain the skills, knowledge and experience of people you have worked so hard to find.

If working groups aren't an option, see if they may be interested in volunteering in other ways. If all else fails, make sure you have asked the unsuccessful applicants if you can contact them if a place on the board becomes available in future.

ACTION 12: Consider what other opportunities you could offer applicants who you are unable to appoint as trustees or those who decide being a trustee isn't the right option for them. List the alternate opportunities in the planning template ([appendix A](#)).

3.2.5 Appointment of new Trustees - Co-opting

Appointment of new trustees by the existing board is termed 'co-opting'. The formal appointment of new trustees through co-opting needs to take place in a board meeting so that it can be minuted. During the board meeting, the process will usually involve an existing trustee acting as a proposer and then if another board member seconds the motion, the new trustee is officially co-opted onto the board (if your governing document sets out a different process for co-opting new trustees, then you must follow the instruction of your governing document).

ACTION 13: Decide on what procedure will be followed to co-opt new trustees, checking your governing document as appropriate and add the details to the planning template ([appendix A](#)).

Co-opted trustees need to be aware that they will have to step down at the next AGM because they haven't been elected by the membership. However they are normally eligible to immediately stand for election by the membership at the AGM. If re-elected through an AGM, Co-opted trustees become full trustees.

Please note: your governing document should detail the exact process for co-opted trustees at the AGM and so overrides any guidance provided in this toolkit.

3.2.6 Induction

Far too often, organisations tend to overlook the importance of an induction for new trustees. However, if you are going to get the best from new trustees, you need to help them understand the finer details of the organisation and how they can contribute. You should also be aware that a good induction will make new trustees feel valued and is more likely to generate commitment to the role, improving retention of trustees.

Ideally you will have an induction pack for new trustees; something they can keep and refer back to as needed. If you don't already have an induction pack for trustees then it is worthwhile putting one together and you are likely to find it will prove a useful reference for existing trustees as well.

As a minimum, an induction pack should include copies of:

- Governing document
- Business Plan
- Who's Who – staffing structure and contact details
- Roles and responsibilities of trustees
- Contact information for key contacts
- Latest Annual report / accounts
- Policies and procedures
- Details on current projects, challenges, activities etc
- Working Groups and their remit

ACTION 14: In the planning template ([appendix A](#)), list the documents you will include in a trustee induction pack (or review your current pack if you already have one).

In addition to providing reference materials to help new trustees get to grips with their role, there are additional things that you may wish to consider in order to get the most from your new trustees:

- Mentorship – some organisations will pair a new trustee with an existing trustee who will act as a dedicated source of support and/or mentorship. This means new trustees feel more connected and are able to ask questions that they may be too inhibited to ask during board meetings.
- Identify training needs – formalising any training needs at the start can help new trustees to quickly identify the benefits they will gain through being a trustee. If you don't review the training needs of your board already, then this is potentially something that can be done for the whole board, ensuring your working knowledge is as current as possible.

ACTION 15: Plan the induction process you will use to help trustees get established quickly. Will you use mentorship and if so, which of the existing trustees will be willing to take on a role as mentor? Who will conduct an assessment of training needs and when? Include this information in the planning template ([appendix A](#)).

3.3 Implementing your campaign

By completing the planning template, you will now have a clear view of the types of people you are seeking and how you will manage the process to reach and engage new trustees. In order to run the campaign smoothly, it's best to use all this information to create an action plan. This will ensure that everyone on the board is clear about what happens when, who is responsible for what and give you a timeline. The action plan is a very valuable management tool and will enable the progress of the campaign to be monitored effectively. An action plan doesn't take much effort to pull together, especially as you have the information you need in the planning template, so try to resist the urge to rush into launching your campaign until the action plan is complete.

If any changes are introduced once you have begun to implement your plan, make sure you update the action plan accordingly as this can help reveal any unforeseen conflicts in the timeframe between different actions.

[Back up](#)

ACTION 16: Complete the action plan in appendix G, assigning key responsibility and timeframes for each action.

4 Don't forget

- Once you have appointed new trustees/directors, you will need to update the charity or company register and notify the Charity Commission/Companies House as appropriate.
- Make sure you have some regular board meetings (or working groups) timetabled after appointing new trustees. Having a few meetings in quick succession will not only help new trustees settle into their role, but will also help establish the new board structure and inter personal relationships more quickly.
- Make sure new trustees complete a 'declaration of interests' as part of your Conflicts of Interest policy.
- Arrange any training as appropriate – either in house or through external providers.

- Failure to make new trustees feel needed and part of the team can be the biggest reason for trustees/directors resigning, so do what you can to help them feel part of the team as soon as possible.
- Retention is almost as important as recruiting, so make sure you regularly check how all trustees are feeling about things, to ensure your recruitment campaign has been time well spent.

5 Recruiting Volunteers

The process outlined in this toolkit has focussed upon finding new trustees or directors. However, trustees and directors are still volunteers and therefore this toolkit can easily be adapted to elevate your efforts in recruiting volunteers.

Exactly the same principals can be applied in recruiting other volunteer roles, you simply have to shift your focus and adapt your campaign to suit your needs. For example:

Be clear on why you need volunteers	How many? Break the volunteer tasks into clear roles within the organisation. Make sure all your volunteering policies are appropriate and up to date.
Be clear on volunteer positions available	Looking for general volunteers is seldom successful because people like to know what they are getting themselves into. What skills and knowledge does the organisation need?
Create a person specification	Create clearly defined roles with particular skills and knowledge required. If you are willing to train up volunteers then say so, but be clear on the 'type' of person suited to the role.
Audience segmentation	Volunteers can come from anywhere, but if you are seeking particular skills then you'll need to target your advertising for different audience segments.

Advertise	Your advert and the way you advertise should meet the kind of people you're seeking. e.g. Social media can be very effective if you are looking for younger volunteers.
Getting to know applicants	Informal social events with volunteers can be valuable for appointing any volunteer, not just trustees. You need to know volunteers will enhance your activities and be an asset rather than a liability.
Shortlisting	You may decide to apply some form of interview process. Whilst recognising that some volunteers could be put off by a regimented interview, you can still incorporate a laid back and casual interview process. When done appropriately, interviews can actually increase a volunteer's perceived value in gaining a position with your organisation.
Appointment and Induction	A proper induction process is essential for anyone joining your organisation, not just new volunteers. Inductions will minimise problems and get the best from anyone working for you, ensuring safe working and improving volunteer retention.

Appendix A - Planning template for Trustee Recruitment Campaign

Action point	Page ref	Planning trustee recruitment	Your response
1	13	<p>List the reasons why your organisation needs to recruit new trustees.</p> <p>What problems have you encountered in the past with regards to recruiting/retaining new trustees? How will you overcome these problems?</p>	
2	13	<p>According to your governing document:</p> <ul style="list-style-type: none"> • What is the maximum number of trustees your board can have? • How many trustees are you allowed to co-opt onto the board? • What rules govern the appointment of new trustees? • From the above – how many new trustees are you seeking to appoint in this campaign? 	
3	14	<p>List the skill and knowledge gaps that you hope to fill as a result of the trustee recruitment.</p>	
4	15	<p>What benefits will someone gain as a result of being a trustee with your organisation?</p>	
5	15	<p>List some keywords relating to the character traits and personality of the people you are seeking as a trustee (e.g. reliable, energetic, community minded etc)</p>	
6	16	<p>Using the information on skill gaps and character traits, and the benefits you can offer potential trustees, write an outline person specification for the trustees you are looking for</p>	
7	20	<p>Where will you post adverts and what are the important considerations for your advertising in order to reach your target audience (i.e. keywords to use)?</p>	

8	22	<p>How will people apply? Application Form? Personal statement? Letter?</p> <p>What needs to be included in the application pack for new trustees? Will you make this available online or send out through the post (or both)</p>	
9	22	<p>Who will oversee the following steps of the application process:</p> <ul style="list-style-type: none"> • Responding to informal enquiries • Sending out application packs in response to requests • Confirmations for receipt of application • Initial shortlisting (if applicable) • Sending invitations to attend informal social 	
10	23	<p>What structure will your informal social event take? Set a rough agenda for the event and set the time, date and place.</p>	
11	24	<p>Following the informal social event, will you include additional shortlisting and selection steps i.e. 1:1 interviews, invite to attend a board meeting etc? State what additional steps you will include (if any) prior to making formal appointments.</p>	
12	25	<p>What other opportunities could you offer to good applicants who do not get appointed as trustees?</p>	
13	26	<p>What process needs to be followed in order to co-opt new trustees?</p>	
14	27	<p>What documents will you include in a new trustee induction pack?</p>	
15	27	<p>Which of the existing trustees will be willing to act as a mentor for new trustees?</p> <p>Who will conduct a training needs assessment for new (and existing) trustees?</p>	
16	28	<p>Transfer the summary information in the this planning template into an action plan – template action plan provided in appendix G</p>	

Appendix B - Board Skills and Knowledge Assessment

Instructions:

The following table should be completed by every trustee (a separate table for each trustee). Please try to be as honest as possible, the purpose of this exercise is not about comparing who knows more, but about identifying the skills and knowledge your board needs to find through a trustee recruitment campaign.

Read the list of skills and knowledge in the first column. There will undoubtedly be some missing, so please add in any other skills or knowledge as appropriate.

Rank each skill/knowledge for how important/relevant you think it is to your particular board.

0 = not important or relevant

1 = fairly important / relevant

2 = important

3 = very important / relevant

4 = Essential

Mark yourself for each skill or knowledge area as follows:

Y = yes, I have this knowledge

N = no, I do not have this knowledge or skill

T = I would like training on this.

Your Name: Organisation:

Skill or Knowledge Areas (add additional skills and knowledge as required at the end of the table)	2. Importance to your board (scored 0 to 4)	3. Mark yourself for each skill/knowledge. (Y, N or T)
LEGAL		
Charity Law		

Company Law		
Health and Safety		
Governance		
Transport legislation		
Child Protection		
Safeguarding vulnerable adults		
Equalities		
Employment Law		
Data Protection		
OPERATIONAL		
Knowledge of Local Community		
Knowledge of Disabilities		
Working with Young People / Youth work		
Older people		
ICT		
Accounts and Financial Management		
Operation of Transport services		
Vehicle management/maintenance		
Human resources		
Managing volunteers		
Knowledge of other organisations, groups		
Completing grant applications and bids		
Policies and Procedures		
MARKETING		
Social Media		
Publicity		
Website development		
Creating publicity		
Writing press releases		
Networking		
Presentations		

BUSINESS DEVELOPMENT

Business Planning		
Strategic development		
Organisational and planning skills		
Stakeholder engagement		

OTHER – please add in any other skill / knowledge areas below

Chairing meetings		
Treasurer		
Negotiation and trouble shooting		

Appendix C - Sample Recruitment Advert

Volunteering Opportunity: Trustee of **[Insert your organisation's name here]** Community Transport

Role: Charity Trustee

Pay: Voluntary (unpaid)

Hours: Variable. Approx 2 hrs/month

Location: Cwm Valley

Closing date: 31st May

[Insert your organisation's name here] Community Transport

[Insert your organisation's name here] Community Transport is a charity that has provided dedicated transport services to the local community for over **[number]** years. We are a committed, flexible, people-centred organisation that strives to ensure no person is prevented from leading a happy and fulfilled life due to lack of access to transport.

The Opportunity:

We are excited to announce that we are currently seeking **[number]** new trustees to join our board. This opportunity is open to anyone aged over 18 years who shares our vision of a fair and just society where nobody is excluded on the basis of disability, gender, faith, sexual orientation, ethnicity or age.

As a trustee you will join our board of **[Insert number on board]** people, providing oversight and perspective on our current activities and help guide the future development of the charity, including the development of new projects and flexible transport services for those in need.

The Benefits:

The role is voluntary but offers an opportunity to develop a broad range of skills and experience related to the management and operation of a charity, as well as opportunities for personal development and training including:

Financial management	Legal compliance
Budgeting	Managing volunteers and staff
Business development	Report writing and interpretation
Health and safety	Fundraising

Build confidence	Grant funding and investment
Marketing	Equalities

Person Specification:

Previous experience is desirable but not essential - support and training will be provided.

Desirable skills and knowledge include: business planning, ICT, social media, problem solving, grant funding, negotiation, HR and/or operating public transport services.

We are particularly looking for people with a positive outlook and an ability to take on the role of a critical friend, considering and discussing information and reports from staff and management and asking questions as appropriate to ensure the organisation maintains its direction and focus on our charitable objectives. You will need to be committed, astute, community minded, tolerant, resilient and responsible. An ability to think flexibly in order to find solutions to problems will be a great asset.

How to Apply:

Please e-mail us or write a letter to **[Insert contact details]** detailing why you are interested in becoming a Trustee and what you feel you can bring to the role. For an informal discussion please contact **[contact name and number]**.

Appendix D - Audience Segmentation exercise

Skills and/or characteristics of potential trustees	Audience Segments - Places and job roles where we might find these skills and characteristics?	Appropriate communication channels	Considerations	Potential Keywords/concepts to include in communications as a hook for engagement
e.g. Financial knowledge	e.g. Local accountant	e.g. Direct approach – letter / email	e.g. Develop business links through supporting local community.	
	University/ College post graduates	Students Union – send poster and/or listing for student magazine.	Students gain skills and knowledge but often lack experience that many job applications require – therefore being trustee will provide work relevant experience	Real world Experience Improve job prospects
	John Cash (friend of chair)	Direct approach from Chair – face to face discussion	Potential conflicts of interest so may need to review the policy to ensure it's still fit for purpose.	

Appendix E - Example Volunteer Recruitment Adverts

An example advert targeted at the Community

The longest journey begins with a single step:

Unless you can't walk, have no car or can't use public transport?



Cwmvalley Community Transport is a charity that has provided dedicated and personalised transport services to the local community for over 16 years, making sure nobody is disadvantaged because of transport problems.

Join our team and make a real difference to people's lives

We are currently recruiting for 3 vacancies on our board of trustees to help guide some exciting developments over the next few years.

We are particularly looking for: community minded individuals who want to make a difference. We'd especially like to hear from anyone who knows how to use social media, or have skills related to marketing, financial management, or business planning, but this isn't essential.

We can offer: Training and personal development, the opportunity to develop strong community ties, employment related skills, mutual support and friendship, feel good factor.

We'd love to hear from you, so whether you want to apply or just want to know more :

Contact Greg on (01111) 234567 or
e-mail : cwmvalleytransport@ctmail.co.uk
www.cwmvalleyCT.org

Closing date for applications: 30/01/2016

An example advert targeted at Corporations

Are you looking for new ways to fulfil Corporate Social Responsibility?



Cwmvalley Community Transport is a charity that has provided dedicated and personalised transport services to the local community for over 16 years, making sure nobody is disadvantaged because of transport problems.

We are recruiting new Trustees to help make a real difference to people's lives

We are currently recruiting for 3 vacancies on our board of trustees to help guide some exciting developments over the next few years.

We are particularly looking for people with skills in:

- Financial management / Funding arrangements
- Project Management
- Social Media and Marketing

Reap the rewards from supporting local communities

If you have any staff with the skills listed above who would be willing and available to take up a position on the board of trustees, we'd love to hear from you.

For further information :

Contact Greg on (01111) 234567 or
e-mail : cwmvalleytransport@ctmail.co.uk
www.cwmvalleyCT.org

Closing date for applications: 30/01/2016

Appendix F - Informal Social Event Agenda

(adapt as you required)

Date:	
Time:	
Venue:	

Agenda:

Introductions and Icebreaker - Get each person to state 3 things about themselves, two of which are true and one which is a lie. Everyone else has to guess which is the lie.

Presentation / tour of premises - Provide information about the organisation, its objectives and activities, its history and plans for the future etc.

Role of Trustees - explain the roles and responsibilities of being a trustee and how that translates to being a trustee with your organisation.

Coffee Break - opportunity for applicants and trustees to chat informally and get to know a little bit more.

Existing trustee's viewpoint - each trustee to provide their personal view about the organisation and what it's like to be a trustee.

Applicant viewpoint - each applicant encouraged to explain why they are interested in applying and any concerns or worries they may have.

Q&A session - applicants can ask questions to existing trustees

Expression of interest - applicants to complete form to clarify if they still wish to continue with their application or withdraw from the process.

What next - explain what will happen next so applicants are well informed.

Close

Appendix G - Trustee Recruitment Action Plan

Action	Details	Cost/ budget	Responsibility	Start date	End date
Create a person specification for new trustees	As agreed in planning template				
Create adverts and publicity tailored to identified audience segments	As agreed in planning template. Ensure closing date stated.				
Prepare the application pack	As appropriate depending upon whether you will be posting hard copies or making available online. Ensure deadline for submission is included.				
Create new trustee induction pack	As detailed in planning template				
Advert goes live	Distribute advert to agreed communication channels. Be aware of deadlines for community magazine etc.				
Responding to enquiries and sending application packs.	Fielding informal enquiries as well as sending application packs out.				
Receiving and recording applications received and confirm receipt with	All applications must be treated confidentially and stored securely.				

applicant.	Keep a record of the date received.				
Review and shortlist of applications	All applications should be reviewed and assessed against the person specification. If applications are shortlisted, record the reasons behind your decision making.				
Invite shortlisted applicants to informal social event.	By letter, e-mail or telephone.				
Getting to know applicants	Informal Social Event to be held as agreed in planning template				
Additional shortlisting (optional)	As agreed in planning template. Ensure the basis of shortlisting is compliant with equalities legislation.				
Making an offer	Make formal offer to successful applicants and offer alternative opportunities to applicants are not appointing as trustees.				
Appointment	Board meeting or general meeting to appoint new trustees. Process detailed in planning template				

Trustee Induction and mentors	Provide induction for new trustees as agreed in planning template. Assign mentor or at least provide contact point for questions or concerns.				
Induction for applicants taking up non-trustee roles.	Ensure any applicants taking up other voluntary roles, receive suitable induction.				
Declaration of Interests	All new trustees should complete a declaration of interests form to help identify any future conflicts of interest.				
Future Board Meetings	Agree and set future board meeting dates to occur soon after appointments.				
Legal duties	Update register of trustees/directors and inform Charities Commission or Companies House of new appointments as appropriate.				
Complete Training needs assessment	Identify any additional training needs for trustees and arrange suitable training.				