

Top Tips



Trustee recruitment

Mission and Values | People



This guide will be useful for: organisations who need to recruit new trustees to their board.

What you want to achieve:

Community and voluntary organisations come in many forms, from small unincorporated associations, Charities, Charitable Incorporated Organisations (CIO), Cooperatives, Community Interest Companies (CIC) 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. Therefore, finding the right people to create an effective and cohesive board is essential if your organisation is going to survive and thrive.

What you'll need:

Knowledge of your governing document. ✓

An identified person able to take responsibility for the recruitment process. ✓

An understanding of the skills and knowledge required to strengthen your board. ✓

How you'll do it:

- Having **a strong and effective board is extremely important** to ensure that your organisation meets its legal obligations and charitable objectives.
- As these positions are voluntary and can involve a significant time commitment, it can sometimes be difficult to recruit trustees with the skills, knowledge and experiences that you are looking for. Some people also may feel reluctant to apply for a trustee position because they do not fully understand what it involves. Saying you're **open to people without prior trustee experience and committing to providing the proper training** on appointment can significantly boost your chances of success

Below, you will find some of the steps involved with recruiting trustees and some templates which may help you through the process:

Steps	Things to consider
Check your governing document	<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?
Decide who you are looking for	<ul style="list-style-type: none"> • What skills and knowledge would be beneficial? • What personality traits are you looking for? • How can you ensure your board is diverse?
Design your advert	<p>Make sure that your application pack includes:</p> <ul style="list-style-type: none"> • Background information about your organisation and the value of being a trustee. • The skills, knowledge and character traits that you are looking for. • Details about how to apply or find out more (application form/CV/covering letter/conversation with the Chair). • The deadline for submissions.
Decide where you will post your advert	<ul style="list-style-type: none"> • Share using social media e.g. Twitter or Facebook. • Online platforms such as Reach Volunteering or Do-it. • Local publications e.g. community magazine. • Your local Council for Voluntary Services. • Directly approach candidates you think could fit the role.
Decide your application and selection process	<ul style="list-style-type: none"> • Will you go through a formal interview process? • Will you invite candidates for an informal meeting with your board? • Will you invite candidates to attend a board meeting as an observer? • How rigorous your selection process is will likely depend on the size of your charity.
Consider other opportunities for good applicants	<ul style="list-style-type: none"> • If you have more applicants than positions, then you do not want to turn anyone away who has skills or knowledge that can benefit the organisation. • Consider if there are any other positions within your organisations where they could offer support.
Make sure you are clear on the process which needs to be followed to co-opt new trustees	<ul style="list-style-type: none"> • Your governing document will set out how to approve new trustees. • It is likely that this will involve 'co-opting' the new trustees at a board meeting and then formally appointing them at your Annual General Meeting. • You will also need to update the register of trustees/directors and inform Charity Commission or Companies House of new appointments as appropriate.

<p>Provide new trustees with an induction.</p>	<p>As a minimum, an induction pack should include copies of:</p> <ul style="list-style-type: none"> • Governing document • Business Plan and latest annual report / accounts • Who’s Who – staffing structure and contact details • Roles and responsibilities of trustees • Policies and procedures • A declaration of interest form to complete • You may also allocate an existing member of the board to mentor a new trustee.
<p>Allocate someone to oversee the entire process</p>	<p>Someone should take responsibility for:</p> <ul style="list-style-type: none"> • Writing and promoting the trustee advert • Responding to informal enquiries • Confirming receipt of applications • Setting up interviews/information meetings or invites to relevant board meetings. • Giving feedback to anyone who is not successfully appointed

Other things to consider

- **All members of your board should fully understand their responsibilities as a trustee.** You should ensure that there is appropriate training, either in-house or through external providers, available for all members of your board.
- **As a minimum, all new trustees should read ‘[The essential trustee](#)’** which sets out what is required of a charity trustee and explains what their responsibilities are.
- You will need to **ensure that new trustees are made to feel welcome** and part of the organisation.
- **Your boards should reflect the same diversity as the communities that you serve.** This will help to ensure that the views and opinions of all sectors of the community are considered which can lead to better outcomes and decision making. **Think about the language you use when advertising for trustees** and consider how you can encourage applications for different backgrounds
- **Further information about recruiting trustees can be found at:**
 - [Charity Commission](#) – Including a range of guides and resources.
 - [Getting on Board](#) – A charity which supports trustee recruitment.
 - [NCVO](#) – Offer a range of resources and training, as well as the [Good Trustee Guide](#).
 - Your local Council for Voluntary Action – They may be able to support with recruitment and training.

Recruitment advert template

Trustee of **[Insert your organisation's name here]**

Role: Charity Trustee

Pay: Voluntary (unpaid)

Closing date: [Inset date]

Hours: 4 board meetings a year and contact in between meetings from time to time

Location: **[Insert location]**

[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 **[provide examples]**.

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]**.
