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Recruit a Trustee Pocket Guide

Recruit a trustee

Pocket Guide

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Trustee Recruitment Toolkit

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1. Introduction

Trustees are essential to the well being and effectiveness of the voluntary and community sector. In voluntary and community organisations throughout the country, whether in a small volunteer group working locally or in a large complex national charity with paid staff, there is a small group of people who are responsible for the organisation. These are the trustees¹.

Trustees have the ultimate legal responsibility for keeping their organisation focused on its purpose and directing the strategy (working with staff where they exist). They also have financial oversight, are responsible for resources, and are expected to ensure the organisation stays within the law.

Finding and keeping effective trustees is a vital and sometimes challenging task for all voluntary and community organisations.

This guide is designed to help you to address a few core questions which will put you on the path to successful trustee recruitment.

¹ They may also be known as board members, Management Committee members – we use the term *trustee* to refer to those people who are legally responsible for an organisation.

About this pocket guide

This pocket guide offers short practical advice to help you recruit a trustee for your organisation. The pocket guide is a companion publication to the ***Trustee Recruitment Toolkit***, a more extensive guide also produced by the Governance Hub.

The ***Recruit a Trustee Pocket Guide*** is structured around a few essential questions your organisation needs to ask itself when recruiting a trustee. It also signposts you to other information and resources and includes links to relevant resources in the toolkit, all of which can be downloaded for free. The pocket guide is a good starting point for small organisations.

The ***Trustee Recruitment Toolkit*** is available in print for £15 and on the Governance Hub website as a free download. It includes case studies, templates and guided activities. It sets out a systematic 10 step approach to recruiting trustees, which may be particularly helpful to larger organisations. The contents of the toolkit are summarised in Section 11.

2. Thinking of recruiting a new trustee?

Some of your trustees may have left or are intending to leave soon. Or maybe you feel the board needs reinvigorating. Time to recruit – but where to start?

It's an easy thing to overlook, but make sure you check your constitution or governing document. This may limit your recruitment options; for example there may be a maximum number of trustees, it may set out how trustees are to be chosen e.g. by election or nomination, or it may require certain groups to be represented, for example users of your services.

If you are a registered charity you should also be aware that certain people are legally barred from acting as trustees e.g. someone who is an undischarged bankrupt, or anyone under 18 (except in certain circumstances).

It's a good idea to plan and schedule the whole process from the outset – as recruiting a new trustee usually takes at least several weeks, and involves a range of people. You need to be clear about who is responsible for what, and what information you will need to have prepared, by when.



Relevant activities

- Check your powers
- Make sure you understand the legal position
- Plan the process



Resources to help you from the *Trustee Recruitment Toolkit*

- Sample milestone plan
- Check your governing document
- Understand who cannot be a charity trustee



see www.governancehub.org.uk for downloadable resources from the trustee recruitment toolkit

3. Stuck in our ways? Can we do this better?

It's easy to just do things the way we always have without stopping to think whether it's the best way. Most voluntary organisations find their new trustees by simply asking around. This has the benefit of being simple and often does find new recruits. However it's a limited approach. You are likely to miss out on a larger pool of talent out there, so it's not surprising that many organisations complain they find it difficult to find appropriate trustees. It also makes it more likely that your trustees will think in similar ways and may not reflect the diversity of the community you serve.

Use the opportunity of recruiting a trustee to reach out to a wider group of potential recruits.



Relevant activities

- Assess the diversity of your board
 - does it reflect the community you serve?
- Promote your vacancy widely
(more on this in Section 6)



Resources to help you from the Trustee Recruitment Toolkit

- Diversity perception questionnaire
- Ways to promote your vacancy a short guide



see www.governancehub.org.uk for downloadable resources from the trustee recruitment toolkit

4. Is our organisation ready?

It's all very well finding a new trustee but are you ready for them? Do you know what you need them to do? Can you use their skills effectively? Can you answer reasonable questions about your plans for the future? Do you have the relevant policies in place e.g. code of conduct or an expenses policy?

Good Governance: a Code for the Voluntary and Community Sector recommends that 'before new trustees are appointed the Board should determine what new attributes and knowledge are needed' (Principle E7). It's important for the Board to think carefully about the trustees they need for the organisation to be successful.



Relevant activities

- Assess what skills your organisation needs now and in the future. Review what skills your current trustees have. Note the gaps – these are some of the skills you should be looking for in your new trustee
- Review your readiness to welcome and accommodate a new trustee e.g. are you willing to reconsider when you hold your meetings? Could you support a trustee with disabilities?
- Consider what might prevent a good trustee from joining your board: for example is it easy for them to know what you do? Do you use a lot of jargon?



Resources to help you from the Trustee Recruitment Toolkit

- Skills assessment matrix
- Board readiness questionnaire
- Obstacles to diversity



see www.governancehub.org.uk for downloadable resources from the trustee recruitment toolkit

5. What kind of person do we need?

Have you got a clear description of what you want the person to do? Do you know what kinds of skills, knowledge or experience are needed? Don't even think about recruiting until you have worked out the answers to these questions. Take the time to create a description to suit the particular needs of your organisation.

It helps if you are specific about what you are looking for e.g. if you want financial skills, are you looking for a formal qualification (if so what kind of qualification), practical experience, or the ability and willingness to develop a skill within a certain time? Distinguish between the things that you 'must have' and those that would be 'nice to have'. Avoid the temptation to ask for a super hero or heroine – they are in short supply!

Remember that some people are not eligible to be charity trustees – see Section 8 for more information.



Relevant activities

- Work together to describe what you need your trustee to do
- Describe what you are looking for in your trustee. What skills, experience, knowledge or other qualities do you need them to have to do the job well?
- Look at the Trustee Standards to get an overview of trustees' roles and responsibilities, go to www.ukworkforcehub.org.uk



Resources to help you from the Trustee Recruitment Toolkit

- Sample trustee role description
- What are you looking for in your trustee – a template
- Create a portrait of your ideal trustee



see www.governancehub.org.uk for downloadable resources from the trustee recruitment toolkit

6. How do we get good candidates to apply?

A little imagination here goes a long way. Think yourself into the place of your ideal trustee. Where do they get their information from? What clubs or networks might they be involved in? What are the benefits to them of getting involved with your organisation? This will help you choose the best ways to get your message across to the kind of people you need.

There are a range of options – many of them free. You can get help from volunteer agencies, trustee brokering services, recruitment agencies. You can use special internet sites such as **www.do-it.org.uk** or **www.getonboard.org.uk**. Tap into relevant networks: local, national or specialist, and ask them to help spread the word for you to their members. You can try advertising – use free options like a notice in a local library, community centre or GP/health centre. See if you can get a feature in a relevant newsletter or in the local newspaper.



Relevant activities

- List the different ways you could promote your vacancy – and then choose the best ones for you. If you need inspiration the resources below will help you
- Make a list of the benefits of being a trustee and remember to point them out
- Write a short punchy notice or advertisement to tell people about your vacancy
- Prepare an information pack for candidates
- Make sure all Board members promote your vacancy widely



Resources to help you from the Trustee Recruitment Toolkit

- Ways to promote your vacancy – a short guide
- Create a promotions strategy
- Good reasons to be a trustee
- Application pack – checklist
- Do's and don'ts for writing an advertisement
- Sample advertisements



see www.governancehub.org.uk for downloadable resources from the trustee recruitment toolkit

7. How do we choose the right person?

Agree in advance the most important qualities you are looking for, which are you willing to compromise on? How are you going to assess whether candidates have these qualities: by question, by observation, from the application form, from referees? You'll probably want to interview candidates – decide on your questions in advance.

Be clear about who is making the decision. Is it existing trustees, members, a group of voters or is your trustee nominated by another organisation?

Make sure that those making the decision have the information they need: about the candidate, the role and the qualities needed.



Relevant activities

- Agree the 'must have' qualities you are looking for and agree how you will assess whether candidates have them
- Make sure those making the decision understand the role and the key qualities needed
- Remember to thank everyone who applied – not just the successful candidate



Resources to help you from the Trustee Recruitment Toolkit

- Tips for different selection methods
- Shortlist scorecard
- Interview questions and criteria



see www.governancehub.org.uk for downloadable resources from the trustee recruitment toolkit

8. Have we covered the formalities?

Once you have made your choice, there are important details you need to attend to. You need to be sure your new recruit is appropriate – ask for references, check they are eligible to be a trustee. You will need to update your paperwork e.g. bank mandates, insurance policies, board mailing list. You will also need to write to other key people such as the Charity Commission and professional advisers. You may need to amend legal documents where specific trustees are named.

Don't forget to tell staff, users, members or others who are interested in the organisation that you have a new trustee. It is also a good way to make the trustee feel valued.



Relevant activities

- Check your new recruit is eligible to be a charity trustee
- If necessary obtain a disclosure from the Criminal Records Bureau (this may apply if your organisation deals with children or vulnerable adults)
- Be sure to take up references
- Inform everyone who needs to know
e.g. Charity Commission, Companies House (if your organisation is a company), bank, insurer and other professional advisers



Resources to help you from the Trustee Recruitment Toolkit

- Sample trustee declaration of eligibility
- Checklist of whom to inform and documents to amend



see www.governancehub.org.uk for downloadable resources from the trustee recruitment toolkit

9. How will we welcome our new trustee?

Remember how it feels when you are the new person? You don't know how things work, who does what, how to behave and whether to ask a question or stay silent? A few simple things will help your trustee settle in more quickly, feel comfortable and able to contribute.

Think about what your new trustee might need and the best ways to help them. Written documents are good for sharing key information, but nominating another trustee to help answer questions is a better way to get reassurance and encouragement. Ask your new recruit what they need and keep checking back with them.



Relevant activities

- Put together a timetable of events and activities that help your trustee understand the organisation and their role
- Get together a pack of relevant information – start with key information only, try not to overload them
- Think about who can be a 'friendly face' for the trustee to turn to while they're gaining confidence



Resources to help you from the Trustee Recruitment Toolkit

- Induction programme planner
- Key induction documents



see www.governancehub.org.uk for downloadable resources from the trustee recruitment toolkit

10. What next?

It's a good idea to review how the recruitment process worked and see what you can learn to improve the process next time. Ask people what worked well, what was difficult?

Recruiting the trustee is just the start. You need to help them and your existing trustees to develop their skills and ability to work together.

Good Governance: a Code for the voluntary and community sector sets out seven key principles of good governance. These are:

- A Board leadership
- B Board in control
- C High performance board
- D Board review and renewal
- E Board delegation
- F Board and trustee integrity
- G An open board



Try to find ways to support all your trustees to meet those principles. You could consider:

- mentoring
- training
- taking part in trustee or specialist networks
- away days, training days or retreats
- appraisals
- performance review
- benchmarking



You can find where to get information and advice on developing your board in the Resources section of the ***Trustee Recruitment Toolkit***.



see www.governancehub.org.uk for downloadable resources from the trustee recruitment toolkit

11. What is in the full toolkit?

Step	Key activities	Resources to help you
Step 1	Plan the process	• Milestone plan
Step 2	Check the legals: what you can and cannot do	• Check your governing document • Understand who cannot be a charity trustee
Step 3	Prepare the board for a new trustee	• Skills assessment matrix • Diversity perception questionnaire • Board readiness questionnaire
Step 4	Plan for diversity	• Obstacles to diversity
Step 5	Describe the role of the trustee	• Sample trustee role description • What are you looking for in your trustee – template • Create a portrait of your ideal trustee



Step	Key activities	Resources to help you
Step 6	Promote your vacancy	• Ways to promote your vacancy – short guide • Create a promotion strategy • Good reasons to be a trustee • Create an application pack – checklist • Do's and Don'ts for writing an advertisement • Sample advertisements
Step 7	Select your trustee	• Tips for different selection methods • Shortlist scorecard • Interview questions and criteria
Step 8	Complete the formalities	• Sample trustee declaration of eligibility • Checklist of whom to inform/what documents to change
Step 9	Induct your trustee	• Induction programme planner • Key induction documents
Step 10	Evaluate the process	• Induction effectiveness questionnaire

12. Further resources on trusteeship and governance

Governance Hub

www.governancehub.org.uk

The Governance Hub website has a comprehensive signposting service to governance resources and support, plus an e-learning facility. Resources include:

- Trustee Recruitment Toolkit, Ruth Lesirge, Rosalind Oakley and Joanie Speers, 2006, £15 or as free downloads
- Good Governance; the Code for the Voluntary and Community Sector 2005 (free) and supporting toolkit 2006, £15 or as free downloads

The Charity Commission

www.charity-commission.gov.uk

The Charity Commission has an extensive range of relevant publications. Resources include:

- CC3: The Essential Trustee 2005
- CC30: Recruitment, selection and appointment of charity trustees (Forthcoming)

National Council for Voluntary Organisations (NCVO)

www.ncvo-vol.org.uk

The AskNCVO website has an extensive array of resources on all aspects of trusteeship and governance. Resources include:

- The Good Trustee Guide, Peter Dyer, 2004, £25

SAVO's Trustee Pathway (Suffolk Association for Voluntary Organisations)

www.savco.co.uk

The Trustee pathway CD-ROM contains, checklists, self-assessments, examples of best practice and audio clips. SAVO £5

Institute of Chartered Secretaries and Administrators

www.icsa.org.uk

ICSA offer free guidance notes and model documents covering job descriptions, appointment letters and other aspects of good practice.

Charity Trustee Networks

www.trusteenetworks.org.uk

CTN helps trustees to share knowledge and experience with each other. Resources include:

- Recruiting Trustees: Avenues for Support

Workforce Hub

www.ukworkforcehub.org.uk

National Occupational Standards for Trustees and Management Committees (pocket guide free, toolkit £10) and supporting toolkit £15 (from www.governancehub.org.uk) or as free downloads.



The full toolkit lists further resources on board training and development, diversity and volunteering. The resources listed above are free unless stated otherwise.



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The Governance Hub is a programme to improve the quality of the governance of voluntary and community organisations in England. It is an independent partnership of eight organisations which provide support to the voluntary and community sector – acevo, bassac, BTEG, Charity Trustee Networks, East Cornwall CVS, NACVS, NCVO, and Volunteering England. The Hub is part of the Home Office ChangeUp strategy to strengthen the voluntary and community sector and is receiving funding from the Active Communities Unit for two years.

The Governance Hub aims to:

- Promote trusteeship and get people from more diverse backgrounds involved
- Provide resources and services for trustees, boards and advisors who work with them
- Develop local support to increase knowledge and skills relating to governance and boards
- Work through partnerships at every level

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