

# Voluntary and Community Action

## Induction of New Trustees

Development Information Sheet No. 2

October 2007

Cast your mind back to when you first joined a committee. Were you introduced to the organisation and given all the information you needed or thrown in at the deep end and left to figure it out on your own?

This is one of a series of Information Sheets produced on organisational, management and development issues. Our Development Officer also offers impartial and confidential advice and guidance on a wide range of issues.



All voluntary and community groups, whether large or small, benefit from providing an induction programme for new committee members. The better your induction, the more effective new members will be and the more likely they will choose to stay with you! A good induction programme will:

- provide all the background and key information about your organisation and the committee's role in governing it
- ensure new members feel *welcome, valued and part of the team*.

Induction may involve meetings with other trustees, staff and volunteers, familiarisation with premises or facilities and written information. This can be a process over time rather than all done at once.

### Providing Key Information

All new trustees should be given an induction pack. This pack should be reviewed regularly to make sure documents are up to date. What goes in the pack will depend on what your trustees need to perform their role and the legal status, size and stage of development of your organisation. However, at a minimum, all committee members

should be provided with:

- your governing document (e.g. constitution)
- annual report and accounts
- minutes of recent management committee meetings
- roles and expectations of trustees (e.g. role description, attendance at meetings, code of conduct etc.).

### Ideas for the perfect induction pack:

- exciting, colourful folder to carry important documents
- a brief history of the organisation
- recent newsletter/publications about the organisation
- a page of photographs of what the organisation does and who's in it
- role description for being a trustee or specific role on the committee
- list of committee members and contact details
- structure of the organisation - committees, working groups, user groups, staff and volunteers
- list of key committee dates and key events in the life of the organisation

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- copy of recent minutes and annual report
- organisational strategy or business plan
- constitution or memorandum and articles of association
- key policy documents – e.g. equal opportunities, health and safety
- questionnaire about your expectations for being a committee member (to be discussed with the chair in a nice coffee shop).

*Adapted from The A-Z of Good Governance, produced by the Governance Hub.*

Some ideas that other organisations have used:

- special reception to follow election of new members at the AGM
- dedicating a good part of their first meeting to introductions, rather than launching straight into business
- 10 minute 'speed dating' style introductions to staff, and committee members
- matching a new member with an existing committee member who will organise introductions and provide information and support for the first few months
- regular one-to-one support and supervision provided by the chairperson to check how new committee members are getting on and to address concerns
- scheduling training or development 'away days' for the whole committee shortly after new members join (e.g. looking at strategic or organisational planning).

**WE HAVE A SAMPLE ROLE DESCRIPTION FOR A MANAGEMENT COMMITTEE AND ROLE DESCRIPTIONS FOR A CHAIRPERSON, SECRETARY AND TREASURER, IN SEPARATE INFORMATION SHEETS**

### Ensuring that New Members Feel Welcome

New members will feel comfortable and confident in contributing if they are made to feel welcome, valued and well supported. It is important to think about ways to ease newcomers onto your committee, rather than assuming that they will form relationships and settle of their own accord.

**IT IS ESTIMATED THAT THERE ARE OVER A MILLION ADULTS OF ALL AGES, SOCIAL BACKGROUNDS AND WALKS OF LIFE WHO BECOME TRUSTEES AND ANOTHER MILLION PEOPLE SITTING ON THE COMMITTEES OF SMALL COMMUNITY GROUPS.**

### Joining the Board



Cast your mind back to when you came to your first board meeting. What did you feel? What did you need to know?

## Sample Induction Checklist

### Activities

- Introduction to other trustees
- Introduction and talks with staff
- Introduction and talks with volunteers
- Introduction to members
- Tour of office or other buildings
- Observing the organisation's activities or projects
- Reading key information about the organisation (see below)

### Key Documents (induction pack checklist)

- Governing document
- Latest annual report and accounts
- Minutes of recent board meetings
- Copy of the Charity Commission's 'The Essential Trustee'
- Copy of 'Good Governance – a Code for the Voluntary Sector'

### Other Documents/Information

- Key policies e.g. health and safety, code of conduct, conflict of interest, financial controls and human resources
- History of the organisation
- Organisational structure
- Senior staff job description
- Statement of ethos and values
- Business, strategic or work plans
- Newsletters, publicity material
- Dates and agendas of forthcoming committee meetings
- Names and contact details of other committee members

*(this checklist and details of the Code of Governance can be downloaded from the Governance Hub [www.governancehub.org.uk](http://www.governancehub.org.uk))*



**THE MOST IMPORTANT THING ABOUT TRUSTEES IS THAT WITHOUT THEM, VOLUNTARY ORGANISATIONS LARGE AND SMALL COULD NOT CONTINUE THEIR GOOD WORK AND NEW VOLUNTARY ORGANISATIONS WOULD NOT BE FORMED.**

**GOVERNANCE IS "THE PROCESS BY WHICH A GOVERNING BODY ENSURES THAT AN ORGANISATION IS EFFECTIVELY AND PROPERLY RUN .... GOVERNANCE IS NOT NECESSARILY ABOUT DOING; IT IS ABOUT ENSURING THINGS ARE DONE"**  
**SANDY ANDIRONDAK**

## Introductions

At the first committee meeting of a new trustee, the chair should invite them to:

- introduce themselves
- say what their previous involvement with the organisation has been (if any)
- say what skills and experience they bring to the organisation
- say why they decided to join the committee.

Other meetings should be arranged with key people involved in the organisation. These could include:

- committee members, particularly the chair, secretary, treasurer
- volunteers, and/or staff
- a site visit to see the work of the organisation.

Possible questions at the meetings might include:

- activities and services currently provided
- issues or challenges facing the organisation
- future direction of the organisation
- managing volunteers/staff
- involving users in the running of the organisation
- the involvement of the committee in running the organisation

- division of tasks between trustees
- sub-committees – how and why they are formed, who is selected to sit on them, and how they report back.

## Review Meeting and Ongoing Support

There should be a review meeting planned after a few weeks to allow the new committee member to feedback with their first impressions and to address any issues or concerns. This might involve further explanation of the organisation's structure or activities or an opportunity to identify specific skills or interests which the trustee can contribute.

Don't forget that committee members, just like other volunteers, operate most effectively if they are given regular support and the chance to develop their skills.

Induction is just the start of the learning process. It should be seen as forming part of a broader agenda of ongoing training for new and existing trustees.

We can provide advice and bespoke training in many aspects of governance and trusteeship. Alternatively, there is a free, e-learning toolkit for trustees that you can work through at your own pace in your own time. Go to [www.trusteeElearning.org.uk](http://www.trusteeElearning.org.uk) to register.

### Free E-Learning for Trustees

An interactive, computerised learning programme for new trustees and those wanting to update their skills and knowledge

[www.trustee-elearning.org.uk](http://www.trustee-elearning.org.uk)

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## How can we help?

Contact our Development Officer if you would like more information on being a trustee or support and training for your management committee or board.

If you are interested in becoming a trustee, please contact our Volunteer Centre who can put you in touch with suitable, local opportunities.

Please give us a call on 01525 850559 or email [development@action-centralbeds.org.uk](mailto:development@action-centralbeds.org.uk) or [volunteer@action-centralbeds.org.uk](mailto:volunteer@action-centralbeds.org.uk)