

# Voluntary and Community Action

## Recruiting Trustees

Development Information Sheet No. 3

March 2007

Before recruiting new trustees, there are a few things that should be thought about in advance. This information sheet identifies some of the legal restrictions that exist and suggests some useful ideas to help develop the sort of management committee that you would like.

This is one of a range 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.



### Developing your Recruitment Process

Some of your trustees may have left or are intending to leave soon. Or maybe you feel the board needs skills that present trustees do not have. First you must make sure you are aware of any relevant requirements in the organisation's governing document, such as:

- is there a minimum or maximum number of trustees?
- how are they to be appointed e.g. by election or nomination?
- how long can they stay in office?

Recruiting new trustees is the responsibility of existing trustees. They must oversee the management of an open and efficient process and always act in the best interests of the organisation.

### Check Legal Restrictions

Not everyone is eligible to become a trustee. Before you start recruiting, check Charity Commission restrictions and also your organisation's governing document, Memorandum of Association, Trust Deed or constitution for any additional restrictions on the composition of your board.

If you are a registered charity you should also be aware that certain people are legally barred from acting as trustees:

- someone who is an undischarged bankrupt
- anyone under 18 (unless the charity is a registered company)
- anyone who has been convicted of an offence involving deception or dishonesty unless the conviction is spent
- anyone who has previously been removed from trusteeship of a charity by the court or the Commissioners
- anyone who is under a disqualification from acting as Company Director.

You do not need to investigate or ask specifically of prospective or new trustees concerning the above matters. However, you do have a responsibility to bring these requirements to their attention. Include a suitable declaration on your trustee nomination form.

### Identify your Needs

You should also consider:

- what new skills, knowledge or experience does the board need?
- are there specific interest groups that a new trustee could

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represent?

- should the trustee board be more diverse than it is at present? For example to include people from different social or ethnic backgrounds or to include people with disabilities.

### Prepare your Recruitment Materials

You should develop a role description and even have an application pack for prospective trustees. Be clear about the legal

responsibilities and time commitment involved in the role, as well as your organisational aims and requirements.

The first thing you need to do is to proactively inspire people to become trustees. Let them know that this is a unique role through which they can use their individual passion, skills and experiences to make an impact on the issues that concern them. The role of trustee may also be a unique opportunity to further develop themselves in a way that would not normally be possible through the workplace or other voluntary opportunities.

Try to match the benefits you offer – such as networking, developing new skills or making a difference – with the kind of people you hope to attract as trustees; after all they are volunteers and there has to be some payback for the time, effort and skill they put in.

### Promote your Vacancy

There are a variety of methods which trustee boards can use to recruit new trustees. Traditional methods for recruiting new trustees are often personal recommendations and word of mouth. Research shows that although these methods are widely used, they are not necessarily the most effective ways of finding the people with the skills which the trustees have identified, as they limit the field from which trustees can be drawn.

There are other options to publicise trustee vacancies for free. You can get help from Volunteer Centre South Bedfordshire who are able to

## Equality and Diversity



A diverse board will:

Be more responsive to the community it serves.

Bring fresh perspectives to the way the organisation is governed.

Be more inclusive in the way its mission is fulfilled.

## Questions

1. How could your board be more representative of people from different ethnic and cultural backgrounds, people with disabilities and young people?
2. How can your board value and celebrate the contribution of people from diverse groups?
3. What contribution could a more diverse board make to the success of the organisation?

advertise your vacancies on special internet sites such as [www.do-it.org.uk](http://www.do-it.org.uk), a website designed to match vacancies and potential trustees, which is linked to the *Get on Board* campaign.

By using other methods you can access a wider range of applicants.

### Shortlist and Select

Selection processes for trustees may be dictated by governing documents or constitutions – be clear about who is making the decision. Is it existing trustees, members, a groups of voters or is your trustee nominated by another organisation?

However, agree in advance the most important qualities you are looking for, and those you are 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. Any short-listing process should be well planned and enable candidates to demonstrate the key criteria required.

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

### Nomination and Election of Trustees

The methods used for appointing new trustees will depend on the procedures laid down in your organisation's governing document. Most management committee members are appointed through an election process, usually at an Annual General Meeting.

The members or management board put forward the names of individuals who they would like to be considered for membership. Confirmation of membership may be by 'seconding' a nomination, a vote by the board or voting by the membership.

A trustee may also be 'co-opted' to the board by the management committee. This method is often used when special knowledge or expertise is needed.

Other trustees may be appointed or nominated by an outside body such as a local authority.



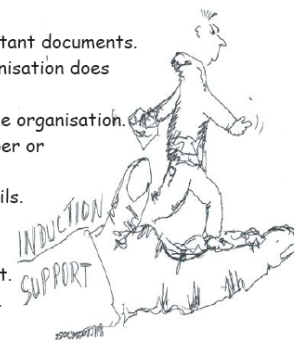
### Joining the Board



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

### Ideas for the perfect induction pack

1. Exciting, colourful folder to carry important documents.
2. A page of photographs of what the organisation does and who's in it.
3. Recent newsletter/publications about the organisation.
4. Role description for being a board member or specific role on the board.
5. List of board members and contact details.
6. List of key dates for the board and key events in the life of the organisation.
7. Copy of recent minutes and annual report.
8. Organisational strategy or business plan.
9. Governing document.
10. Questionnaire about your expectations for being a board member. (to be discussed with the chair in a nice coffee shop)



## Induction and Support

Most importantly, when you have secured new trustees make sure they receive a warm welcome, good induction, and support in areas that they need to perform effectively. The new trustee should receive key documents relating to the organisation/charity with an explanation of their purpose and effect. In this way new trustees can find out how the organisation works.

Key documents to be given to new trustees should include:

- governing document
- latest annual report and accounts
- minutes of recent board meetings
- the policies, e.g. code of conduct, conflict of interest, financial controls
- newsletters, publicity material
- any other key documents which trustees will need, strategic plan and its vision and values or mission statement.

You could have a buddy system, where an existing trustee or the trustee who is standing down advises and supports a newcomer.

## Evaluation

Review how the recruitment process worked and see what you can learn to improve the process next time, ask board members what worked well and what didn't; ask for their suggestions for improvement. Most importantly ask the new trustee for their perspective on the process.

## Further Information and Resources

For further information or assistance in recruiting new trustees contact the Volunteering Officer or Development Officer at Voluntary and Community Action South Bedfordshire or review the following resources:

- The Trustee Recruitment Toolkit, R Lesirge, R Oakley, J Speers, NCVO, July 2006, available as a PDF at [www.governancehub.org.uk](http://www.governancehub.org.uk)
- Finding New Trustees - What Charities Need to Know, Charity Commission, July 2006, available as a PDF at [www.charity-commission.gov.uk](http://www.charity-commission.gov.uk)
- Get on Board website [www.getonboard.org.uk](http://www.getonboard.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)