



Trustee Recruitment

Finding Trustees can be difficult and finding ones who are appropriate for the role even more so. Trustees have a key responsibility for an organisation, they are essential to the well-being and effectiveness of an organisation. Becoming proactive on recruitment may help you recruit the people you really need and approaching it in a planned way can take away the stresses and strains of reacting to a situation or because AGM is coming up.

1. Plan the process

The board needs to work together with a common goal in mind—to find a new trustee to help you deliver the objectives of your organisation in the best way possible. Having the right people for the right job can make the difference between stagnation and development, they can also provide very necessary support to staff and take on roles like reviews of policy and procedures etc.

- **Allocate responsibility**

to someone/sub-group to manage the process and deal with practical tasks and agreeing the budget and how that will be funded.

- **Plan and schedule your activities**

Drafting up a plan so that you don't overlook any important details. Activities are suggested later on, which could form part of your plan. Of course it all depends on the type of group and its size etc. Adopt it to reflect your needs.

2. Check the Legals

Are there any legal restrictions on how you recruit? Refer to your governing document. The law also sets limits on who can serve as a charity trustee so you need to be aware of these.

- **Checking your governing document**

- do you have a maximum number of trustees?
- do you have any procedures regarding nomination, election or re-election?
- Any clauses regarding Representation of different interests on the board?
- Powers to appoint or co-opt trustees?
- Maximum terms of office?
- Age limits?
- Other eligibility criteria e.g. concerning the users of your service?
- Places reserved for people holding a particular position eg. Chief Exec of a local health trust?
- Places reserved for nomination by another organisation such as a local authority.

- **Understand who cannot be a charity trustee**

People who are legally barred from being charity trustees include:

- Anyone under the age of 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.

This gives only 2 examples, contact the Charity Commission to understand the full list.



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Involving users on the board

You may want beneficiaries or users of your service to be on your board, or your governing document may require it. User trustees can bring enormous benefits to the board: they can draw on their direct experience, and can enhance the credibility of your organisation with other stakeholders. Having users on your board does however raise particular issues that need to be carefully managed. A key issue is to manage potential conflicts of interest and service users who are Trustees need to identify any conflicts. Ways to manage this include:

- Keep a register of interests
- Develop a policy on conflicts of interest
- Require Trustees to withdraw from discussions which pose a conflict of interest for them.

Payment to charity trustees—an explanation

Payment

The law states that without explicit legal authority no trustee may receive from their charity any benefit in return for any service they have provided. 'Benefit' is defined as money, or property, goods or services that have a monetary value. This legal authority comes from your organisation's governing document, a court of law or the Charity Commission. The basic principle is that there should be no conflict between a trustee's duty to their charity and their own personal interests, unless the conflict is transparent and is managed properly and openly.

Expenses

Trustees may be reimbursed for reasonable out-of-pocket expenses, which means refunds for payments which the trustee has had to meet personally in order to carry out his trustee duties.

In some cases, the board may have the power (stated in their governing document) to employ one of the trustees to supply a service, but then the specific trustee must not be involved as a trustee in the arrangement.

3. Prepare the board for a new trustee

Analyse what skills the trustee board needs. Before looking for a new trustee, you need to be clear about the skills, knowledge or experience the current board needs, or the skills etc you require to move forward into new areas of work.

- Undertake a skills assessment—it's not just about the skills you need now but the organisation's priorities for the next few years and how the Trustees are going to support this.
- Carry out a diversity perception questionnaire. Diversity is not just about visible differences such as age, gender and race. It encompasses other aspects like difference of education, marital status, sexual orientation or religion.
- Complete a board readiness questionnaire. Is the board sufficiently inclusive and diverse to take on and welcome a new member.

Examples of these assessments and questionnaires are available.

4. Plan for diversity

A diverse board is able to reflect and consider the delivery of its mission with an understanding of the needs and wishes of the groups of people that form its community. Building a diverse and inclusive organisation should be an on-going process that is supported by the entire board and should be reflected throughout the organisation.

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How to work toward a more diverse board

- Identify and address obstacles to diversity. Consider whether you are ready to welcome and support a trustee from an under-represented group. You may need to take other steps first.

The board needs to assess what the barriers might be and what actions could be implemented to work on turning this round. You will then think whether you can recruit someone or whether you need to do other work and make improvements first.

***What prevents a broader range of people from coming forward to be a trustee?
What can we do to overcome these obstacles?***

A few more ideas on consultation

- Set up face-to-face meetings with members of groups who want to get to know you better.
- Invite group leaders of these groups together to have a discussion on inclusion.
- Ask if some of your trustees could attend one of their meetings and give a presentation.
- When you organise events, talk to participants in a structured way to obtain information and feedback.

5. Describe the role of a trustee

Write a role description so that anyone interested knows what is expected of them. They will have a better chance to assess whether they have the skills necessary if you provide a person specification.

- Prepare a role description
- Prepare a person specification—if you think about what your board would like to see first
- Include an eligibility question in the application form

Sample role description is available as well as a questionnaire to help you prepare a person specification.

6. Promote your vacancy

You need to promote the vacancy enthusiastically and widely so that you cover a wide audience and attract good candidates. Don't rely solely on the people you know. Here are some ideas, promoting a trustee vacancy is paramount, you want to get the best person for the role.

- Create a promotion strategy
- Identify good reasons to be a trustee of your organisation
- Create an application pack—checklist

Ways to promote your vacancy—short guide

• Advertising

Newspaper advertising may come to mind, but there are many other ways that can be FREE. Consider a card in a shop window, a poster on a supermarket notice board, at the local GPs, religious or community centres, place an ad in a local newsletter, or hospital radio. There are also national level publications etc like the Guardian or Third Sector as well as specialist ones. If you know what your ideal Trustee should be, think about what they might be reading.

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- **Advertorials**

Try and get advertorials. This is when a publication writes about your organisation and advertises your message. Think about what publications there might be locally and which might be read by the type of trustee you're looking for. It could be a local sports club circular, Rotary Club newsletter, local free sheet for the area. Whatever the publication don't be afraid to make contact with them and explain why their readers should be interested in your organisation—and see if they will write a few lines or even a feature. They'll be more interested if there is a newsworthy angle, so it all depends on how you put yourself across. Not just we need trustees, you'll need to be more imaginative than that!

- **Networks**

Think of the networks your ideal Trustee might be involved with. It could be the local chamber of commerce, professional network like a Lawyers group, local faith organisations. See if the network can help distribute information on the vacancy for you. Don't forget to ask your members and supporters to spread the word too, they may be interested, or they may know someone who might be.

- **Volunteer Centres**

Always take your information to your local volunteer centre, as they are able to put your information on to volunteering websites and use their networks.

Create a promotions strategy

1. Who are you trying to attract to become a trustee

You have drawn up a person specification for your ideal candidate, now ask board members to pick out **3** most key words/phrases from the person spec to use in your advertising.

Someone who **Lives locally**, who enjoys the **Environment** and knows about **Finance**

2. Have a brainstorm

Think of all the different ways you could make contact with the type of person you have described with your three words, write down all your ideas, however wacky they might seem.

For example: talk to local allotment holders, a notice up at the local garden centre, are there any environment courses/classes at college or in the community, gardening clubs, local accountants, Rotary or Lions Club, the pub etc.

whatever might have links with those 3 key words.

3. Review Ideas

Now review your ideas to see which are actually feasible and possible to do with the capacity and resources you have—time, money and energy. But don't forget that the more effort you put in now, might be worth it when you get someone appropriate for the role. It will be less work in the long run. This is now your plan.

Identify good reasons to be your trustee.

There may be many people ideally suited to the role, but why would they give up their time to help? What would motivate them to get involved?

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Being a trustee you:.....

- Use skills and experience effectively
- Make new contacts and friends
- Improve personal networks
- Develop new skills
- Working for a common cause
- Getting involved in the local community
- Experience job-satisfaction — as your input has tangible results

These are general, your organisation though must offer specific benefits: think about what your service users or members gain from your activities and how trustees contribute to think.

Dos and Don'ts for writing an advertisement

A separate information sheet is available on this. There are also several case studies available to find out how other organisations worded and formatted their advertisements for trustee vacancies.

Application Pack

Once you start advertising you need to have an application pack and contact in place.

What do you include?

- Information about your organisation
- Background information about the role of a trustee
- Trustee role description—don't make this look like a job description (if it is too long it will put people off and they'll think, with all that to do, I should to be paid!)
- The person specification
- Contact person for more information
- Details of open information session (if you're able to hold an event—can you link it into something else you're doing, so that you're able to do this too without extra expense?)
- Copy of advertisement
- Details of how to apply
- Details of current board members

Don't use the same application form as you do for staff, as it may be too complicated for this purpose. *A sample is available on request.*

7. Select your Trustee

You need to choose the right one from those who have put themselves forward. Don't go about it in the same old way you always have done. Trustees are an important resource and you may have a long relationship with them, spend time and thought on how you do it.

Make the most of the selection methods you use.

Draw up a short list score card—*a sample is available on request*

Plan your interview—*a sample of interview questions are available on request.*

Think about how formal you want the interview to be, people generally communicate better when they've been put at ease and are feeling relaxed.

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Plan what you will say to them before you actually start questioning them. Decide what questions you will ask them and be clear about how these will help the candidates show how suitable they are for the role you want them to carry out—keep it relevant and focussed on the criteria you've set out. Aim for dialogue with open questions and to be able to explore their experience and knowledge and how that matches up to your person spec.

Tips for different selection methods

Appointment by existing trustees (sometimes known as co-option) is the most well-known and common method of selection and gives the board the greatest scope to select the board members it wants.

There are other selection processes please see separate information sheet on Selection Processes for details on this—elections, nominations and ex officio.

8. Complete the formalities

There is a formality checklist available, so that you can check everything that is essential.

You should check any legal aspects, take up references, confirm eligibility, check any conflicts of interest. When this process is complete you can confirm the appointment, making it clear to the new trustee that they are a valued member of the team.

There is a sample declaration of eligibility available on request.

Once you have made the checks and confirmed the appointment, don't forget to contact the unsuccessful candidates so that you leave them with a positive feeling about your organisation. Good impressions last too, and there may be someone in this group who might be appropriate another time. It would also be helpful to explain why someone else was chosen over them so that the candidate can take any steps in their personal development which might assist them.

Making the most of the appointment—an announcement in the local press etc would help motivate the new member but also give the organisation further publicity. Don't forget to update all necessary paperwork, website pages etc. There is also a list of the changes you might need to make, available on request.

9. Induct your trustee

You really want your new trustee to feel welcome so that they are encouraged to identify with the organisation and be committed to what it does. Careful planning of the induction can make a big difference as to how well the new trustee fits in and how well they understand what is going on, so it is important for the entire organisation not just the board.

It is a good opportunity for everyone involved, from other trustees to members of staff, volunteers and service users. Make it a celebration, may be it coincides with something else the organisation is organising, get the press along too!

- Organise an induction programme—a sample of a programme format is available
- Put together an induction pack—please request the checklist for a pack
- Consider a trustee mentor

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10. Evaluate the process

It is important to look back over the whole process to see what went well and what you might need to change for next time.

What did the board learn?

A discussion or a quick questionnaire, depending on whether the board has time to meet on this going over the following questions will prove beneficial, just so that you have comments written down.

What questions can you ask yourselves?

Start at the beginning of the process all the way through—what went well?

What was useful? And why was it useful?

What didn't work and why?

What needs to be changed and how?

Include it in a revised Recruitment Plan, everything is then ready to go for the next time.

The new trustee

ask for their feedback, so that you can make improvements based on their experience of becoming involved. They are the ones who can have comments on the usefulness of the interviewing and induction process you organised for them.

WHAT NEXT?

Becoming a trustee is only the beginning, there is a lot to work on after that, for the board to follow good practice and develop as a team and to develop the organisation so that it is always moving forward.

Please refer to the information sheet on Governance

It is important that the Board regularly reviews its own performance and acknowledges what improvements need to be made in the aim of good practice and organisational development. If they are able to draw up Board Development Plan, then great. So that it is aware of what needs to be addressed and maybe one of the board members can be delegated with task of obtaining training/resources etc so that the board can deliver the plan. Some items may be addressed in a board meeting, others may need separate sessions, there may be training which they can attend.

***There are lots of resources available,
if you require any of the samples, questionnaires or checklists mentioned here
or would like support with recruitment, how to induct a new trustee or
how to start looking at Governance, please contact the Evesham Volunteer Centre***

Disclaimer

The information provided in this sheet is for guidance only. It is not a substitute for professional advice and we cannot accept any responsibility for loss occasioned as a result of any person acting or refraining from acting upon it.

Acknowledgement: National Council for Voluntary Organisations.



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