



GOVERNANCE FACTSHEET – THE BASICS

Recruiting and inducting new trustees

- **Before you recruit**
- **Choosing new trustees**
- **Creating a great induction**

Use this page to learn about the process of recruiting and inducting trustees.

A governing body must make sure it has enough trustees. The board can do this by having a clear plan for recruiting. To help, it's a good idea to evaluate the board each year by considering these questions:

- Have you got enough trustees with the right knowledge, experience and skills?
- Do your trustees need training or support to do their jobs effectively?
- Have you reflected on your board culture and engaged in inclusive practices?
- Do you need new trustees and where will you find them?

If you decide you need new trustees, take time and care with your recruitment process.

Before you recruit

To find the best candidates it's important to have clear goals for your trustee recruitment. Here are some tips to help guide your thinking. While these are helpful to the process of recruitment, it's important to understand how this process needs to be carried out from an equality, diversity and inclusion perspective.

Read our [guidance on equity, diversity and inclusion on your board](#).

- Imagine being a candidate - what will help someone decide to join your board? What will help you identify the skills, experiences and qualities you need from them?
- A role description can help those interested to understand the role.
- Running a trustee skills audit with your existing board can help you learn more about the areas you need. They may be skills, qualities, or experiences. This also helps the trustee identify what they can bring to board membership.
- Check the terms of office for your trustees. Make sure new trustees know how long you expect them to be part of your board.
- Check your governing document for the formal process of appointment or election.

- Agree how you'll decide if:
 - the new trustee is the best person
 - your board is right for them
 - the recruitment process requires an interview or meeting with the chair
 - those interested who show good prospects should observe a board meeting before committing to the role.
- You need to create a succession plan for if you cannot find the right trustee. This could mean hiring more staff with new skills at different levels.

Reach Volunteering together with a group of partners have developed a [recruitment cycle for trustees](#). This free tool sets out what you should consider in planning to recruit new trustees.

See also, [NCVO's Trustee skills audit tool](#)

Choosing new trustees

How you elect or appoint new trustees will usually be set out in your charity's governing document. Any method you use must be consistent with this. Here are some of the most common ways charities can approach the selection process:

- Following a very formal process like their staff recruitment. This might include
 - advertising a vacancy
 - shortlisting candidates based on a CV and person specification
 - conducting a formal interview.
- Follow an informal process. This might involve a meeting with each candidate and then inviting those that are suitable and interested to observe a board meeting. This is an opportunity for them to see how the board works and to meet trustees.
- Members might make the final decision. Some membership organisations help members choose between candidates by:
 - sharing candidate biographies to members before the Annual General Meeting (AGM)
 - alerting members to the role, skills and attributes required.
- If members elect the trustees at the AGM, the board may suggest who they feel is most suitable. They won't have the final say on who the members choose.

NCVO trusted supplier

[Trustees Unlimited](#) is one of the UK's leading trustee and board recruitment agencies. They can help find the right trustees for charity boards of all shapes, sizes, and locations.

NCVO members can **post an advert on the Trustees Unlimited website for free** or receive a **20% discount** on their SNAP Intelligent Trustee Matching service.

[Learn more about Trustees Unlimited](#)

Creating a great induction

Induction is vital. It supports your new trustees, helping them to get up to speed with the role, the organisation and their legal responsibilities. Induction also helps your trustees understand your key policies and procedures. These might include equal opportunities, health and safety, and data protection.

Your trustee induction programme should include:

- meetings and introductions to other trustees, employees, beneficiaries, service users, and other stakeholders
- invitations to events, meetings and presentations
- documents for a trustee induction pack
- buddying or coaching.

Further information

- Read GOV.UK's advice on [what charities need to know and do in the trustee welcome pack](#).
- Read Reach Volunteering's guidance on [creating a great induction for your trustee](#).

IMPORTANT

Make sure when you're following the process of removing a trustee, your organisation is complying with its EDI policy.