

Preparing to Recruit Trustees

Following good guidelines, organisations can confidently recruit the right trustees and cultivate a diverse and effective leadership team with transparency and inclusivity. Getting trustee recruitment right will ensure the ongoing success of your organisation and its activities. We give an overview of considerations below. There is great guidance from Gov.uk on finding and appointing trustees here: [Finding and appointing new trustees \(CC30\) - GOV.UK](#)

1. First Considerations:

Review Governing Documents

Begin by understanding the parameters set by your organisation's governing documents. Evaluate the number of trustees permitted and any stipulations regarding recruitment from the membership. Regularly reviewing these documents ensures alignment with the organisation's current objectives. If necessary, consider updating them to reflect the evolving nature of your activities, especially when transitioning to legal models like the Charitable Incorporated Organisation (CIO). Refer to the [Charity Commission government website](#) for detailed guidance.

Explore Recruitment Options

Familiarise yourself with the various avenues available for bringing new members onto your trustee board. Many governing documents allow for trustees to be "co-opted" between formal recruitment processes, providing flexibility in addressing immediate needs or expertise gaps. However, it's imperative to ensure that all trustees, including co-opted ones, prioritise the charity's best interests and adhere to their responsibilities. Additionally, consider the election process, especially if your organisation selects trustees at the Annual General Meeting (AGM).

Define the Person Specification

Crafting a clear person specification for prospective trustees is essential. Conduct a trustee skills analysis to identify existing strengths and areas requiring enhancement within the board. This analysis should encompass core skills, complementary attributes aligned with organisational strategy, and networks or connections valuable for strategic development. Update this analysis regularly to adapt to evolving needs.

Navigate Legal Requirements

Review for any recent changes in regulations. With reference to the role's responsibilities clarify any specific requirements, such as minimum age thresholds and restrictions on individuals with certain criminal backgrounds.

Consider Diversity and Inclusion

Embrace diversity as a cornerstone of effective governance and ensure that your trustee board reflects the demographics and perspectives of your community or service users. Review the current make-up of your board. Incorporating diversity perception questionnaires can provide valuable insights into the composition of your trustee board.

Time your Process

Strategically time your recruitment efforts to capitalise on peak volunteer engagement periods and awareness events like Volunteers Week and Trustees Week.

2. Steps for a smooth and effective recruitment process:

Delegating Responsibility

The trustee board should delegate the responsibility for organising the recruitment process to a designated person or sub-committee. Clear goals and deadlines must be set to facilitate efficient execution. Whoever is involved, the Chair should retain oversight to ensure alignment with the organisation's objectives. In cases where the Chair position is being filled, consider appointing an external lead, such as the Chair or CEO of a partner organisation, to steer the recruitment efforts.

Defining Recruitment Goals

Clearly define the objectives of the recruitment process, which will inform the selection criteria for prospective trustees. Tailor your approach based on the desired expertise and perspectives:

- For experienced trustees with core skills, consider national advertising.
- To engage individuals familiar with the charity or service users, focus on internal and local outreach.
- To attract candidates from the local community and reach beyond your own networks, utilise local publications and online platforms like [GoVolHerts](#). Seek to extend your outreach via organic social media sharing and paid promotion.

Developing a Recruitment Plan

Devote time to crafting a comprehensive trustee recruitment plan that outlines the steps and resources needed to support the recruitment process effectively. Consider how to reach out to specific demographic groups and whether additional materials, such as translations or audio versions, are necessary to enhance accessibility.

Crafting Recruitment Materials

Develop comprehensive recruitment packs containing essential documents such as role descriptions, application forms, and trustee declaration forms. Tailor your recruitment messages to convey a welcoming and supportive ethos, appealing to a diverse pool of candidates.

Embracing Transparency

Ensure that the recruitment process adheres to formal, rigorous, and transparent procedures, as outlined in the [Charity Governance Code](#). Advertise vacancies widely and evaluate candidates based on objective criteria, emphasising the benefits of diversity. Regularly assess the board's skills and needs to inform recruitment decisions and maintain a balanced composition.

Establishing Terms of Appointment

Define the length of trustee appointments in accordance with governing document or statutory provisions. For trustees serving beyond nine years, undergo a particularly rigorous review process to ensure progressive refreshing of the board. Clearly communicate reappointment decisions in the trustees' annual report to promote accountability and transparency.

Involving Wider Membership

If the governing document allows for trustee nominations and elections by a broader membership, facilitate an informed and inclusive process. Support members' participation in nomination and election procedures, fostering engagement and accountability within the organisation.

3. Selecting the Right Trustees

Selecting the right trustees is vital to ensure your charity is effectively managed. Assemble a diverse group of individuals with the right mix of skills, knowledge, and experience, while also ensuring alignment with the organisation's values and goals. Here are some key considerations to keep in mind during the selection process:

Fair and Open Selection Process

Maintain transparency and fairness throughout the selection process, treating it with the same rigour as staff or volunteer recruitment. Conduct interviews with a small panel of two or more trustees, ensuring representation from diverse perspectives. Consider involving stakeholders or representatives from service users' groups in the interview process. Use standardised questions for each candidate to ensure fairness and maintain confidentiality of interview notes.

Eligibility Checking

Verify that candidates meet the eligibility criteria outlined in the charity's governing document. This may include criteria such as membership status or previous trustee service within a specified period. Incorporate eligibility checks into the trustee application form and refer to [guidance](#) from the Charity Commission to identify any disqualifying factors.

Understanding of the Role

Ensure that potential trustees fully comprehend the responsibilities and expectations associated with the role. Encourage candidates to attend trustee training courses or access online resources to enhance their understanding. Resources such as the [Charity Commission Guidance](#) and [NCVO Guidance](#) can offer valuable insights into trustee roles and responsibilities.

Familiarity with the Charity

Potential trustees should have a solid understanding of the charity's mission, objectives, and operations. Consider arranging meetings between the candidate and existing trustees, particularly the Chair, to discuss expectations and gain insights into the organisation. Inviting candidates to

observe trustee meetings can also provide valuable context for the role and the organisation's dynamics.

Communicating Decisions

Inform candidates of the selection outcomes in a timely and respectful manner. Send a letter or e-mail from the Chair to both successful and unsuccessful candidates, providing brief reasons for the decision and thanking them for their interest. Consider offering alternative roles to unsuccessful candidates who demonstrate valuable skills and attributes that could benefit the organisation, such as ambassadorial roles or advisory committee positions.