
TRUSTEES' INDUCTION

Induction follows the appointment of new trustees, and provides a process for familiarising those individuals with their new role. It assists their understanding and awareness of the organisation, its plans and policies, and enables them to contribute from the start of their period of office. Although some new trustees may be longstanding members or volunteers, it cannot be assumed that they have knowledge or are aware of all those matters which a trustee will need to consider to be able to discharge their duties with care, diligence and skill. Thus all new trustees require to pass through an induction process.

Some organisations have sub-committees that include people who are not trustees. They should also complete an induction process based on the general approach indicated in these notes, but tailored to the purpose and operation of their specific committee.

The person responsible for managing the induction of new trustees is normally the organisation's chair, as the person who manages the board of trustees. However, where there is a vice- or deputy chair, this sometimes falls within the scope of their role description.

An ideal induction process should start with an initial meeting with (as appropriate) the chair or vice-chair. The content of such a meeting might include:

- an introduction to the board of trustees, and how it works
- the expectations both of the board (attendance, participation etc) and of the individual (information, communication etc) - even if these have already dealt with as part of the trustee's recruitment, a refresher at this stage may still be useful
- key personal responsibilities (eg equal opportunities, reporting conflicts of interest)
- details of the trustees appraisal process (if any)
- claiming expenses

At this meeting, or shortly afterwards, the new trustee should be given an induction pack of useful information. Hopefully a role description will have been given as part of the

recruitment process, but if not this should be included in the pack, which should also include copies of:

- a brief history of the organisation and its achievements
- the current governing document (eg the Constitution or Articles of Association)
- the trustees' annual report and financial statements for the two most recent years
- delegations of authority to/terms of reference for of any committees/office-holders/staff
- key policies (eg collecting and disposal policies)
- details of any premises owned and/or occupied,
- financial regulations or rules
- the longer-term strategic plan (if any)
- the business plan and/or budget for the current year
- minutes of the last three meetings of the trustees
- a diary of meetings and events for the forthcoming period where the attendance of the trustee is either required or might be expected
- a list of current trustees, office holders and key staff (if any)/volunteers, together with their contact details

Examples of recent publications, newsletters, promotional material and other printed matter might also be included. References to online resources (eg the website of the appropriate charity regulator, codes of ethics or other sector-specific material) might also be given.

At this initial meeting, agreement can also be reached on the scope of a programme of visits, meetings and conversations with other trustees, staff/volunteers (whether face-to-face or by telephone) to familiarise the new trustee with the organisation and its work. For those new to the organisation observing activities at first hand can be an effective way of acquiring an understanding of its operations; it may be less necessary for those with previous experience as (say) volunteers. Thus in the case of a trustee appointed to a large organisation of which they have no or little prior knowledge, it may take more than a single day. On the other hand, a person very familiar with the work of a small organisation might have a satisfactory induction concluded in a half-day.

Some organisations have found it useful to arrange for an experienced trustee to mentor recent appointments by becoming their 'board buddy', offering support for a period of between six to twelve months. During that period, the new trustee has in their buddy a contact who can facilitate introductions to other trustees at early board meetings and, on an informal basis, provide background information on issues as they arise and talk over any concerns that the new trustee may have

Induction is not the end of trustees' training, and besides updates on legislative and other training refresher training in trustees duties and obligations helps maintain high standards in an organisation's governance.