

# How to recruit trustees for your charity

A practical guide



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# Foreword

A diverse board with a wide range of skills, experience and perspectives bolsters a charity's resilience and gives it the best chance of fulfilling its purposes into the future. Using this guide from Getting on Board, charities of all sizes can successfully and affordably recruit trustees outside their usual pool of contacts.

**Sarah Atkinson, Director for Policy, Planning and Communications,  
Charity Commission**



Rathbones is delighted to have sponsored this guide to help charities recruit the best trustees for their organisation. Importantly, the best practice contained within is based not just on theory but on what has been comprehensively proven to work on the ground.

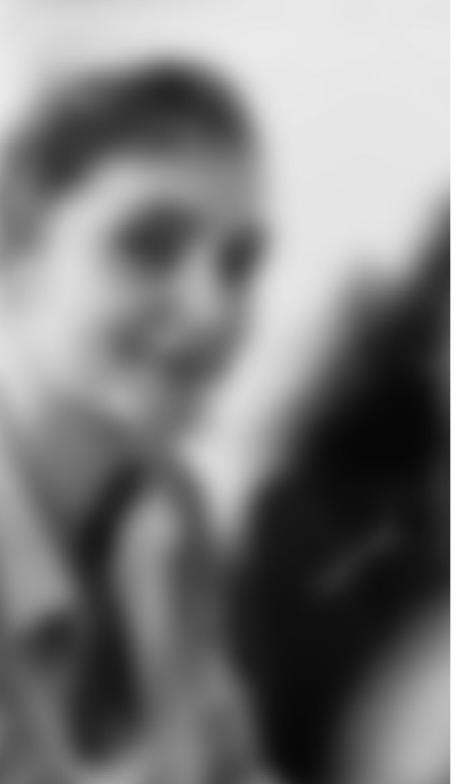
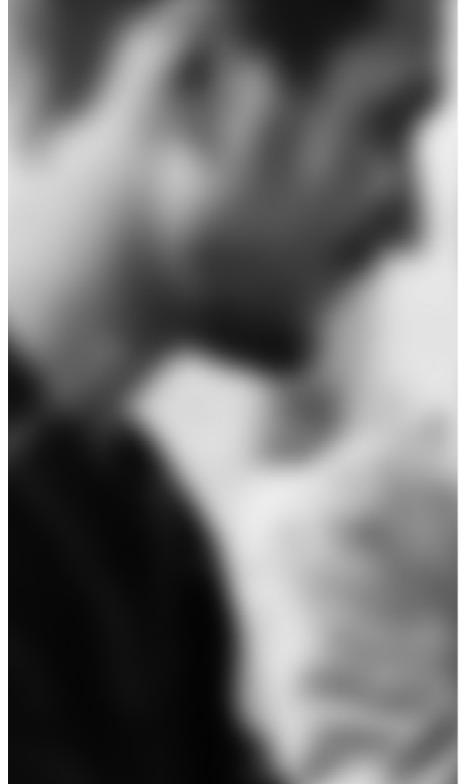
The case for good governance in charities led by trustees that are well-qualified and have a proper understanding of their role has never been clearer. We are all aware of the reputation-shredding stories about charities over the past few years. In addition, disruptive change is happening across the political, economic, legal, social and technological spectrum. It is therefore imperative for every charity to have the best trustees on board.

Governance is a subject close to our hearts at Rathbones. We are a constituent company in the FTSE4Good Index that only includes companies demonstrating strong environmental, social and governance credentials. As a signatory to the United Nations-backed Principles for Responsible Investment, we ensure corporate governance factors are considered when deciding whether we invest in a company on behalf of our clients. Our commitment also extends to supporting charities to understand and manage their own governance responsibilities. As well as supporting great publications such as this, we have had around 3,000 charity trustees attend our trustee education programme over the past 10 years; our aim being to help them perform their roles more effectively.

I am sure that *How to recruit trustees for your charity: A practical guide* will be invaluable to those operating in the charity sector, and we are proud to be involved.

**Andrew Pitt, Head of Charities, London  
Rathbone Investment Management  
[rathbones.com](http://rathbones.com)**





An incredibly valuable experience...

**96%**

of trustees in our research said that they learnt new skills by being a trustee

So it's surprising that...

**74%**

of charities find it difficult to recruit trustees

Until you realise that...

**90%**

of charities recruit most of their trustees through word-of-mouth and existing networks

**73%**

said it boosted their confidence

**90,000**

is the estimated number of trustee vacancies

**84%**

said it made them happier

only

**10%**

of trustee vacancies are ever advertised

only

**54%**

of charities advertise their trustee vacancies on their own websites

# Charity trustees are some of the most important people in a charity.

They have the potential to enable a charity to thrive or bring its operations grinding to a halt, and a charity's service users are dependent on its trustees to make good decisions and lead well.

Charities need a wide range of skills from their trustees, to understand and address the many challenges charities can face and navigate the changing context in which they operate. They need trustee boards that can challenge one another and the status quo, that bring different experiences, knowledge and ideas, but that are able to work constructively and enthusiastically as a team.

That is why board diversity is so important – because diversity brings together the rich mix of qualities that make a healthy and effective board.

## The result?

Only **14%** of charities feel well-equipped to meet the compliance, strategic and development needs facing their organisation.

**59%** of charity boards are not representative of the communities they serve.

# Our programme: Trustee Recruitment Pathways

Following on from [its own research<sup>1</sup>](#) published in May 2017 and [Taken on Trust<sup>2</sup>](#) commissioned by the Charity Commission and published in November 2017, Getting on Board launched the Trustee Recruitment Pathways programme.

Over a period of nine months Trustee Recruitment Pathways worked with 30 charities to develop charity trustee recruitment practice, and to innovate and test free and low-cost trustee recruitment methods. All of our participating charities have an annual income under £2m. 80% had struggled to attract trustees previously and 20% were concerned that they didn't have the right mix of skills on their board to support the charity's future needs.

80%

of the 30 charities  
had struggled to  
attract trustees

"The Trustee  
Recruitment Pathways  
programme really  
helped us understand  
the importance of  
finding brilliant  
trustees."

BEYOND ME

We wanted to prove: that open trustee recruitment does make a difference; that there is a direct correlation between good open trustee recruitment and success in finding the skills, knowledge and experience that a charity needs; and we wanted to give charities practical tools to recruit the trustees they need.

We also wanted to show that open trustee recruitment would be more likely to attract people who don't already know they want to become a trustee and/or groups of people that may be harder to reach.



## Outcomes of Trustee Recruitment Pathways

Our experience proved that high-quality trustee recruitment processes lead to success in finding the skills, knowledge and experience that a charity needs.

74% successfully recruited new trustees during the programme.

55 is the number of trustees those charities recruited, receiving 111 applications between them. This included individuals who had not previously considered becoming a trustee. Some recruitment campaigns are also ongoing so this number will increase.

Most of those organisations that didn't recruit during the programme had to postpone their recruitment campaign because they were delayed by factors external to trustee recruitment, such as a loss of a major funding stream or departure of key personnel.

43% of participating charities before the programme felt partly or well-equipped to deal with the challenges their charity is facing. This increased to 85% at the end of the programme.

35% of charities felt their board was more representative of service users now.

65% of charities felt their board was more diverse now.

68% of participating charities felt they were better equipped to deal with the challenges facing their charity than before.

You can read more findings from the Trustee Recruitment Pathways Programme on [Getting on Board's website<sup>3</sup>](#).



This guidance sets out what we learnt about trustee recruitment and the key components to running a successful campaign.

It includes real-life case studies, examples and quotes from the 30 charities that took part in the programme, as well as lots of practical tips and templates.

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# Why openly recruit trustees?

Your trustees play an integral leadership role in your charity. Your service users deserve leaders who will excel at what they do.

Recruitment for paid roles enables you to select the best candidate having built a relationship and understanding of how you can work together for the good of the charity's service users. Good trustee recruitment works in the same way. A new trustee might shake things up a bit. But it can be a far greater risk if the board table is filled by a group that all think the same way: they're less likely to be alert to the range of risks and opportunities facing the charity, to spark creative thinking in one another, and to bring the breadth of knowledge that a charity may need from its board.

To find the mix of people with the skills and other qualities you need to lead your charity effectively, it's time to look beyond your own front door. Being intentional about when and how to recruit can make a really positive difference to what your board looks like.

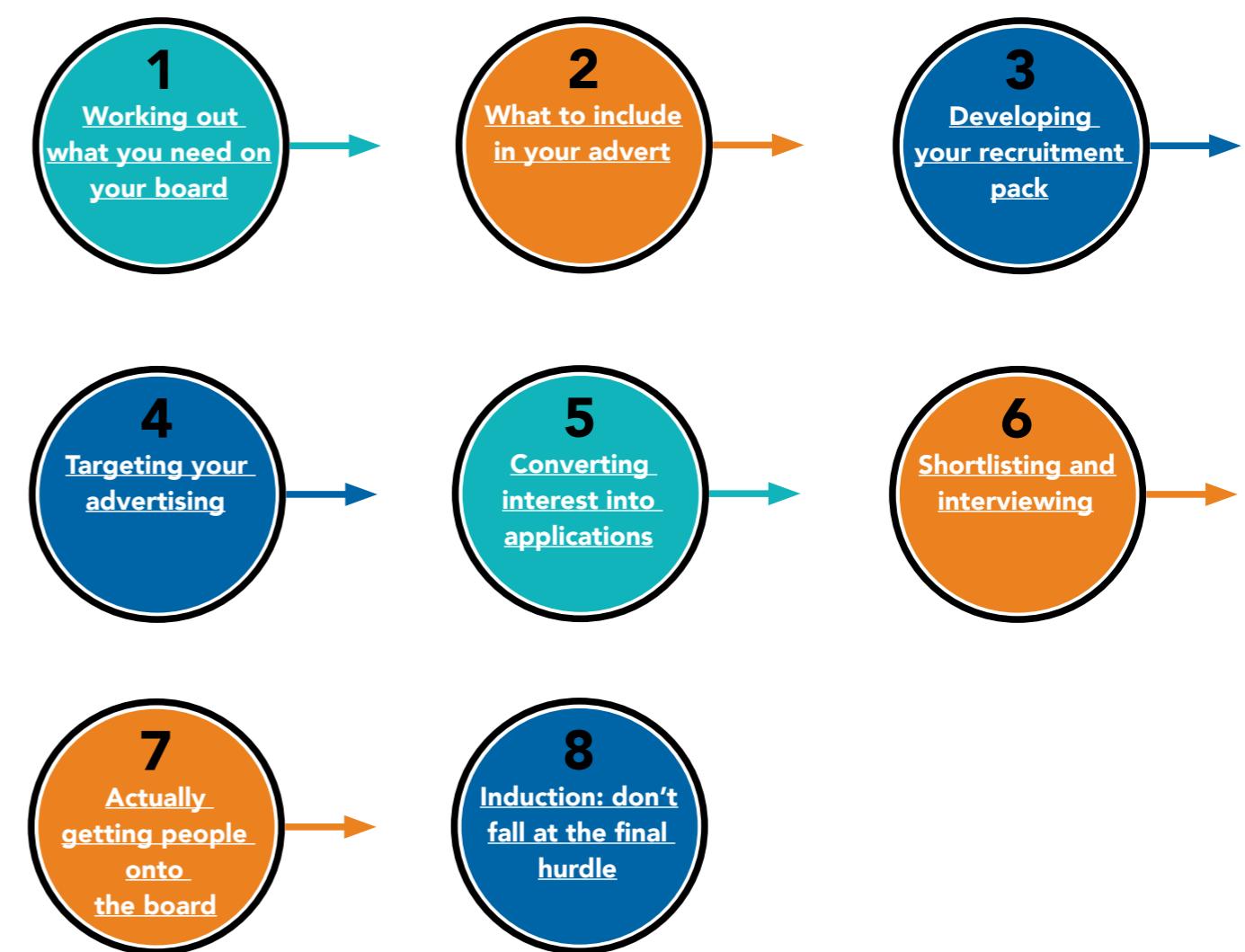
**There can be a fear of bringing in 'outsiders' on to your charity's board. What if they don't understand the charity, or hijack how you do things? These are understandable but often misplaced concerns. However you recruit, your existing trustees will 'own' the process – open trustee recruitment does not change that.**

## It's easy to make a business case for open trustee recruitment:

- Research shows that more diverse boards (in the broadest sense) – in any sector – are able to make better, more rounded decisions and think more creatively.
- Open recruitment enables you to reach a far wider pool of potential trustees and to target the specific skills, knowledge, experience and other qualities that your charity needs at a given point in time.
- There are a plethora of free and low-cost trustee recruitment tools available, so the main resource required is time. A more effective board is a great return on this investment.
- Investing in the future leadership of your charity can save you time and money in the long-run and enable your charity to do even more to support the people you're set up to help.

Trustee recruitment isn't 'one size fits all'. Read on to find what might work for your charity. We've identified the following stages in a good trustee recruitment campaign. Click on a circle to find out more.

# The 8 stages in recruiting trustees



# Before you start

A good trustee recruitment campaign doesn't have to cost £s or be really complicated. But it does need to be thought-through.

Planning your recruitment will take some time and effort – especially if it's the first time you're trying out open recruitment. But trustees are critical leadership roles within your organisation. It's worth investing in getting the right people.

Take time at the outset to plan what the recruitment process will look like for your charity: who will be involved in writing and signing off the advert and/or campaign, or interviewing candidates? What are the key or specific dates within your campaign, including for notice and meeting dates for formal appointment or election of successful candidates?

► Use the checklist opposite.



[Find template/example recruitment campaign plans here.](#)

**Keep the number of steps in the process as small as possible – and make them proportionate to your situation**

Even if you're embarking on your first external trustee recruitment campaign, you don't necessarily have to start with a blank page: use the resources already at your disposal. For example:

- **Vision statement**
- **Mission**
- **Values**
- **Strategy document or business plan**
- **Trustees annual report and accounts**
- **Role description or Trustee Code of Conduct (if you have them)**
- **Extracts from funding bids**

Update or summarise this information, if appropriate. This will help reduce the work involved in your campaign and also help to show 'brand continuity'.

As you look objectively at your charity you can also gauge how inclusive you are as an organisation or how that might appear from an outside perspective. What images and language do you use? How welcoming and accessible does your charity seem to someone outside? You can tackle diversity more effectively by addressing inclusion from the outset. Think about, not just how you come across to the public, but about how you hold meetings and run the charity. Are you inadvertently creating unnecessary barriers or unconsciously favouring a particular image or group? This is a good time to identify and address this.

## CHECKLIST

### Check your governing document

- Minimum and/or maximum number of trustees you can have on your board
- How trustees are appointed and/or elected
- Any rights third parties have to nominate or appoint trustees
- Any individuals who are automatically trustees because of the role they hold (ex-officio)
- Notice periods for meetings to appoint or elect trustees

- Update and/or tailor your advert to match the recruitment methods you will use and specific skills and other qualities you want to attract
- Produce your recruitment pack (if you decide to have one)
- Post your advert!
- Make sure your advert is also available on your website and social media channels

### Filter applicants and interview your potential trustees

- Respond to queries from potential applicants and encourage candidates to apply
- Shortlist applicants to filter out those that don't match what you're looking for (or consciously decide to put them through as a 'wildcard')
- Arrange interviews – whether a formal panel or informal meeting or telephone call
- Prepare interview questions and a template for taking notes and scoring candidates
- Interview your potential trustees
- Select candidates for appointment and notify unsuccessful candidates
- Take up references for successful candidates and confirm eligibility to be a trustee

### Work out what you need on your board

- Assess what skills, experience and other qualities you already have on your board
- Identify the key challenges facing your charity in the next 3-5 years
- Agree the gaps between the skills etc. you already have and what you need – and whether this needs to be filled by a trustee – including to improve your board's diversity
- Use this to produce a person specification

### Formally appoint your new trustees and give them a great induction

- Appoint or elect successful applicants in line with your governing document
- Undertake DBS checks if required for your charity
- Give your new trustees a comprehensive induction
- Evaluate your trustee recruitment campaign including seeking input from your new trustees. Use any learning to develop your trustee recruitment next time

### Get your advert out there

- Write the first draft of your advert including information about your charity, the trustee role and the recruitment process
- Decide how you will target your advert to reach the people you want to attract

# 1

# Working out what you need on your board

A good trustee recruitment campaign doesn't just bring new people to the board – it brings the right people for what your charity needs.

There is no such thing as the 'ideal board': the mix of people your charity needs will be specific to you and will change over time. It can be tempting to recruit on a 'like for like' basis, particularly if you are recruiting because a trustee is standing down from the board. But you can't assume that the skills and experience they had are the most critical qualities you need from a new trustee.

Similarly, there may be advantages to recruiting more than one trustee to cover a wider skills base and/or enable you to be more flexible about the amount of board experience new trustees need to have. There is also some diplomacy needed with existing trustees: evaluating what skills you need from trustees in future isn't to suggest that remaining trustees are deficient in some way and an assessment of skills should be presented as a positive opportunity to re-assess where you are so it isn't perceived as criticism. Rather, it's about making sure that your board as a whole continues to be equipped to provide sound leadership.

"A trustees' skills audit is a useful tool for recruitment, as it prevents time wasting for both candidates and the charity."

NEW TRUSTEE

Many boards are deterred from carrying out a formal skills audit because they

seem like hard work and/or they don't know where to start – or they just haven't thought about it. However, this is a really valuable and vital part of any recruitment exercise. There are many templates available to help. Often these list fairly generic skills and experience that charities need, so whilst they provide a useful basis, make sure you personalise any template to your charity.



[You can find a list of skills audit templates here.](#)

Targeting the specific skills and other qualities you need from new trustees is one of the key advantages of open trustee recruitment.

## 20-minute exercise

An alternative format is a 20-minute exercise – perhaps in a board meeting – to help you identify what you need in new trustees. As a board, ask yourselves:

- > **What skills and experience** do you have around the board table (both professional and personal)?
- > **What challenges and opportunities** is your charity facing in the next five years? What skills do you need to navigate these and why?
- > **What's the gap** between what you have now, and what you need to face your organisation's challenges? Will this change because of existing trustees standing down?
- > Moving beyond the skills your board is looking for, **what diversity of experience**, of economic, social and geographical background,
- and protected characteristics would enhance your board? In particular, does your board reflect your beneficiaries or do you need to recruit someone with lived experience of the issues you are seeking to tackle?
- > **Do the specific skills you need** have to be held by a board member – or could you use someone with those skills that's already on advisory groups, sub committees, other volunteers, staff or external advisers? If you need a skill for a limited time you could co-opt a trustee to the board for a shorter period or appoint individuals to a time-specific 'task and finish' group.

## Example of a simple skills assessment

NAME	PROFESSIONAL EXPERIENCE	RELEVANT PERSONAL EXPERIENCE	NETWORKS AND KNOWLEDGE	SKILLS AND OTHER QUALITIES	PERSONAL DETAILS
Bob Smith	Family therapist, manages own practice	Disabled child	Local council and voluntary sector, training network, social care and NHS	People-focused Good at seeing the bigger picture	Male, aged 46, white
Carol King	Accountant, mainly in retail sector	Sports coach	Chamber of commerce, membership of professional body, county sports partnership	Used to working to targets and tight deadlines Enjoys networking	Female, aged 59, BAME
Joanne Bloggs	Computer science graduate	School mentor	Good links with former university	Attention to detail Problem-solving	Female, aged 22, white
Fred Flintstone	Retired GP	Family member with dementia	Clinical commissioning group, local mosque	Negotiation and persuasion	Male, aged 67, BAME

## Example of a simple skills assessment continued

Challenges facing the charity	Skills and experience needed
Outgrowing current premises – but potential to extend	Individual with experience in building and /or planning to help develop plans to extend the charity's building or source alternative premises
Competition for funding and reliance on contracts	Entrepreneurial or experience generating new sources of income to help protect existing, or diversify, income sources
Developing partnerships to deliver a more holistic service to beneficiaries	Marketing or PR skills to help raise profile of charity amongst new supporters, donors and beneficiaries, and potential partners

### Mixing it up

As part of this process it is worth thinking explicitly about diversity – both in terms of protected characteristics (eg. race, gender, sexual orientation, religion) but also diversity of thought and experience. This is about taking stock of how diverse you are as a group of trustees and whether there are any groups that are under-represented that could add value to your board. The intention is not to target an individual simply because of their protected characteristic(s), but to improve the diversity of your board – and therefore its effectiveness and quality – by reaching out to individuals with the skill-sets you're looking for, who also have different experiences or that think differently to existing trustees, or that have other under-represented characteristics or qualities.

Different personality types or personal qualities may also be relevant. For example, do you have a mix of trustees who have the ability to look at the big picture, as well as those with good attention to detail? Those who think carefully about taking care of staff and volunteers, alongside those who are more driven to get the job done?

**Lawyers and accountants** – who make great trustees – sometimes fear people will expect them to know everything. But they may not be able to advise the charity on specific issues because of professional conduct rules. There's also a reasonable chance they won't be an expert in the areas of law or accountancy practice that are relevant to your charity. If you want a lawyer so you can get free legal advice, appointing them as a trustee probably isn't the answer.

Take a note of the particular types of skills and other qualities that you're looking for from new trustees, as well as the reasons why. It can be difficult to articulate the particular type of people you want to attract, especially if they work in an industry you're not familiar with. Rather than trying to pin these skills to a job title, articulating why you need a particular skill set will help you think more broadly about who could be a good fit for you and also enable potential candidates to self-identify.

### Food for thought

For example: "We need someone with fundraising skills or experience in generating income because we need to find new sources of revenue to build our sustainability, and provide strategic direction to our current fundraising team." Or: "We are looking for a young person with digital skills: to help shape our digital priorities; to guide how we can translate our existing services into a digital format; to be an ambassador and role model to the young people we work with."

### Pinning down your person spec

This will form your person specification and give you a basis against which to assess potential candidates. Remember, there may also be strong candidates that don't obviously meet the specific skill-sets you've included in your advert but who might actually be a great fit for your organisation. Being clear about what you're looking for will help them to communicate to you what added value they could bring.

Another key factor is to assess the time commitment that is required of your trustees. If you are looking to new trustees to sit on committees or working



groups as well as the board, or to volunteer in other ways with the charity, then this also needs to be added in. Bear in mind that this could reduce the pool of potential candidates, so if it's a 'nice to have' rather than a strict requirement then either say this or exclude it from the time commitment. Trustees will often have some tasks to carry out between board meetings, so it's worth asking existing trustees how much time they devote to different aspects of their role on a weekly, monthly or quarterly basis.

As you look back at your list of challenges and opportunities, think about whether any of these are likely to demand more or less time from trustees in future so you can be upfront with potential candidates. You may also need to shift your current practices and expectations of what commitment looks like. For example, you might always have met during the day in person. Meeting by Skype or in a different venue might make trusteeship more accessible for someone with a disability or caring responsibilities who may not otherwise be able to apply. You could also allow others to attend the board to support the individual trustee (such as a carer) and/or adapt your board papers.

# 9

## What to include in your advert

Your advert is the window to your charity. It needs to appeal – both visually and in terms of content – to the people you want to attract.

An advert is a piece of persuasive writing. It needs to be clear what you are 'selling', honest and appeal to the type of person you want to attract.

Why should someone become a trustee – especially of your charity? A useful starting point can be to critique trustee adverts that other charities have produced. What stands out and works

well? Is there anything missing or that would deter you from being a trustee of that charity?

Igniting a passion for your charity's cause is likely to appeal more than a simple description of the trustee role itself. How you describe your organisation and why you exist is therefore critical.



YOUNG CITIZENS

## Top tips for advertising for trustees

**Rachel Crowley, Financial Services Marketing Lead UK & Ireland, Accenture.**

Rachel is not yet a trustee (but is open to being one!)



### 1 Clear as mud

"Don't make the reader work too hard. Think about the information that will help them make a decision to apply and give it to them in an easy, accessible way."

### 2 Make it engaging

"You want to draw people's eye away from everything else so they settle on your advert. A straightforward, conversational style tends to work best, along with an attention-grabbing headline."

### 3 What's your angle?

"What is the ultimate purpose/goal of your charity? How will the new trustee help you to achieve that goal? Don't make the reader guess these things – tell them!"

### 4 Who's your audience?

"Are you hoping to attract more young applicants? People with direct experience of the issues your organisation addresses?"

Someone with specific technical skills? If so, you need to write your advert with that audience in mind. Think about: what information will be most important to them and what tone of voice will be most effective.

### 5 It's (still) about who you know

"Your collective network, and their network, is still a valuable resource for finding trustees. If you need a fantastic property lawyer, an experienced bookkeeper or someone with PR experience, think about who might know someone in that field or have access to a professional organisation or group for those people. It's amazing how wide your network spreads once you start to ask around and a recommendation is a great way to start the conversation."

Ideally, your advert should be a maximum of 1 A4 side. The aim is to grab someone's attention and convince them to find out more. If you try and include everything in your advert it may lose its impact, so it's better to keep it concise and simple and clearly direct potential candidates to sources of further information.

### Food for thought

Writing an advert and deciding where to advertise is a bit 'chicken and egg'. Where you advertise might place constraints on you. For example, most trustee-finder websites will have a standard format with limited scope to alter layout or add in images. But that shouldn't hinder you from being creative: developing an eye-catching or verbally punchy advert might help you to think more broadly about where you could advertise.

The key is to make an advert that will appeal – in style, medium and content – to the people you're trying to attract.

# Key elements to include in your advert

## WHAT YOUR CHARITY DOES.

It may be obvious to you what your charity does and why it exists but don't assume that this will be clear to others. A key component of your advert will be a summary of what you do, who you support, and why that's important. This could simply be a re-statement of your vision and mission, or the summary you include in your Trustees Annual Report, if these are up to date and suitable. Once you've drafted this part of the advert, why not ask someone unconnected to the charity to read it and relay back to you what they think the charity is about?

 You can see some examples of tailored adverts that our charities produced here.

## WHAT THE ROLE ENTAILS AND THE TIME COMMITMENT.

**"Trustees have overall control of a charity and are responsible for making sure it's doing what it was set up to do. They may be known by other titles, such as: directors; board members; governors; committee members. Whatever they are called, trustees are the people who lead the charity and decide how it is run."**

CHARITY COMMISSION FOR ENGLAND AND WALES

The role of a trustee may be unfamiliar to individuals with the skills and other qualities that you're looking for, so don't assume that great potential candidates will know what a trustee is. It may also look slightly different from one charity to another. Describe the role in a way that makes sense to your target audience and will resonate with the reasons they may want to join your board.

## THE SKILLS AND EXPERIENCE YOU'RE LOOKING FOR AND WHY.

A key reason for undertaking an open recruitment campaign is to broaden the diversity of your board, in the broadest sense of the word. It's therefore vital that you include details of the skills and experience you're looking for – and whether you expect an individual to possess some or all of those skills. This may require you to produce different adverts for different types of trustees: the rest of the advert can be the same but the skills section can be tailored with appropriate language and more detailed information. This will help to grab your reader's attention and make the most of the limited space you have. For example, if you're looking for two individuals with marketing and financial skills respectively, someone with a marketing background may not be interested in the implementation of a

new finance system (so it is wasted information) but an accountant might have specific expertise in this.

If you include the reasons why you are looking for those skills, it may enable people to self-identify that they would be suitable for the role even if you haven't explicitly referred to their profession in the advert. For example, a surveyor, architect, lawyer, builder, project manager or contract manager may all have skills that would benefit the charity if it is developing or moving from its premises. Ensure that you're clear about whether candidates need to meet some or all of the criteria – a common trap is that applicants think they need *all* of the skills listed (which they're unlikely to have) because charities have made the mistake of saying 'and' when they mean 'or'. During your skills audit you may also have considered how much experience you are looking for from new trustees. For

example, if you're looking for HR skills will you consider candidates at an earlier stage in their career? If so, it can be helpful to include this in your advert so that it's clear you are not only seeking professionals that hold a senior role in their organisation. Don't limit applications to those with board experience, as this narrows the pool of potential candidates. If previous board experience is not essential, include wording along the following lines:

**"It is not necessary to have previous board or committee experience as training will be provided. This position would therefore suit an individual taking their first steps to develop wider board level and governance experience." Or "Previous board/trustee experience is not necessary and we welcome applications from all ages and backgrounds."**

You may also use a different term to 'trustee', such as director or member of the management committee. Just ensure that potential candidates understand the type of role it is. Include the expected time commitment, and frequency and location of board meetings, to help potential candidates decide if they can meet your expectations.

If trustees can participate in meetings via telephone (if your governing document specifically permits this) or video conference you can include this, although it's preferable to have at least some meetings all face to face. Similarly, if your board could meet during evenings or weekends this could attract more people in full-time employment. Also reference that although the role is voluntary, reasonable out-of-pocket expenses will be reimbursed.

## HOW POTENTIAL CANDIDATES CAN FIND OUT MORE.

Some individuals may apply for the role solely on the basis of your advert. But a concise advert is unlikely to provide all potential candidates with the range of information they would like to know. Your advert can therefore signpost where they can find more information about the role and the charity. This might be to a recruitment pack which can be download from the charity's website with a web-link if the advert is electronic (preferable) or, if this is not possible, that they can request from the charity by phone or email.

You may also provide a named contact who can have an initial chat with potential candidates or respond to email queries about the role or application process, although it should be clear this is optional.

## HOW TO APPLY FOR THE ROLE.

It is crucial that you include in the advert how potential candidates can apply for the role. It is common practice to invite applications in the form of a CV and cover letter by email and/or post. Alternatively, you might direct them to a trustee-finder website or to complete an application via your own job vacancy portal on your website, if you have one. It is recommended that you include a closing date – it will give potential candidates more impetus to apply and will avoid you missing out on good candidates because they hadn't realised you were working to specific timescales. Your recruitment plan should include timescales for your role to be advertised, although it is recommended that you leave an advert open for a maximum of 6 weeks. If necessary, you can extend or re-advertise at a later date.

# A real-life example advert

**Catchy title**

Design and colour helps the ad stand out and is in keeping with charity's branding

Describes purpose of ad and mentions role is unpaid

**Clear description of charity's work**

Makes it clear they don't expect to find all these skills in one person

Simple graphics to show what charity is looking for

Talks about benefits to trustees

Clear on location and time commitment

An opportunity to find out more, or discuss their suitability for those who want it

Doesn't restrict opportunity to people who have been a trustee before

Clear deadline

How to apply

Contact details

**EMPOWER PEOPLE WITH US.**

We are recruiting to a number of voluntary positions to join our Board of Trustees.

We are a successful **relationships charity** with a vision for society where people enjoy good emotional well-being and personal resilience, supported by positive relationships in all areas of their life.

We do this through the provision of **counselling** for children, young people, adult individuals, couples and families, a **domestic abuse service** with integrated support for perpetrators, victims and children, family mediation, parenting courses and **community interventions**.

Whether you're an experienced Trustee or wanting to take your first step at Board level, we want to hear from you.

Our new Trustees will have skills in one or more of the following areas:

- Finance
- Clinical Practice
- Inclusive Generation
- Press and PR
- Human Resources
- Political Influencing
- Digital

**As a Trustee you will have:**

- Induction, training & reimbursable expenses
- Opportunities to make strategic decisions & develop new skills
- Opportunities to network with senior professionals
- Influence to shape innovative projects
- The chance to improve health & wellbeing of people & communities

The expected time commitment is six Trustee meetings per year (meetings are held in Manchester, on Wednesdays between 6 - 8pm), one full day strategy day and some ad-hoc committee work

**Deadline for applications:** 3rd September 2018  
**Interviews:** w/c 10th and 17th September 2018  
For an application pack: please contact [recruitment@talklistenchange.org.uk](mailto:recruitment@talklistenchange.org.uk)

For an informal chat, contact our Chief Executive, Michelle Hunter

[talklistenchange.org.uk](http://talklistenchange.org.uk) [@TLC\\_Charity](https://www.twitter.com/TLC_Charity) [TLC: Talk, Listen, Change](https://www.facebook.com/TLC.Talk.Listen.Change) [f/TalkListenChange](https://www.instagram.com/talklistenchange/)



# Other points to bear in mind when producing your advert:

**Avoid jargon and acronyms that you use within your charity** as these may not be recognisable to those outside your organisation and could deter potential candidates... unless you want to specifically appeal to those with knowledge of the area in which the charity works. If you want to resonate with an industry you're not familiar with then look to other contacts, staff or advisers in your network who may be able to help to draft some suitable wording.

## Your advert needs to resemble who your charity is and what it is aspiring to be.

If a candidate comes to interview and doesn't recognise the organisation they saw portrayed in the advert, it is likely to discourage them from joining your board. The overall style and branding should be consistent with your website and/or other publications the charity produces. Similarly, your advert should underpin your organisation's values. For example, if one of your values is 'accessibility' ensure board meetings have suitable access for those with mobility issues and are at a time of day that most people can make.

## An advert doesn't just have to be in written format.

For example, you could use a video advert instead (or include a link to one) or some infographics, all of which can play particularly well on social media.

## Not everyone wants to volunteer for altruistic reasons.

The research Taken on Trust found that a personal interest in the aims of the charity is the primary reason for the majority of trustees joining their board. But that isn't always the case. Showing how trusteeship can be good for personal and/or professional development can help to attract ambitious candidates who see trusteeship as a tool to gaining new skills, kudos or public profile, or achieving a more well-rounded balance in their life.

**There may be specific requirements that you want to cater for in order to reach under-represented groups**

"I have found the recruitment quite empowering, it was a very positive process that made me feel valued and made me feel that my previous skills and experience would be relevant and welcome in the position of trustee."

A NEW TRUSTEE

**on your board.** For example, if you're looking for individuals who are visually impaired you may want to produce an audio advert or one that is compatible with sight-reader technology. If you particularly want to attract young people to your board this may affect the language and visual design you use for your advert. You could test out your advert on friends or family who fit your target audience. If you would particularly welcome applications from certain under-represented groups then why not say that? For example: "We want our board to reflect the community we support. To enhance the diversity of our board we would particularly like to hear from ethnic minorities, disabled people and marginalised groups."

## An advert doesn't just have to be in written format.

For example, you could use a video advert instead (or include a link to one) or some infographics, all of which can play particularly well on social media.

## Not everyone wants to volunteer for altruistic reasons.

The research Taken on Trust found that a personal interest in the aims of the charity is the primary reason for the majority of trustees joining their board. But that isn't always the case. Showing how trusteeship can be good for personal and/or professional development can help to attract ambitious candidates who see trusteeship as a tool to gaining new skills, kudos or public profile, or achieving a more well-rounded balance in their life.

# "We recruited three trustees!"

SANDWELL AFRICAN CARIBBEAN MENTAL HEALTH FOUNDATION

"We learnt loads from the 'Getting Recruitment Ready' workshop and other advice Getting on Board provided. We realised how important it is to work through a number steps or sequences which should result in recruitment. Our Trustee and CEO left the workshop revitalised and ready to finalise our advert.

"This is the process we followed:

- 1 Agreed the advert**
- 2 Drafted a Trustee Recruitment Policy & Procedure** which includes an induction checklist

**3 Advertised locally** with our CVS organisation and one in a neighbouring borough and more widely using some of the platforms recommended by Getting on Board

**4 We successfully recruited three trustees!** One subsequently changed their mind but we have two additional people who are also interested and will be part of a further tranche of Trustee recruitment later this year. Quite simply the local adverts were good enough and sufficient for our needs. The crucial component for us was having an advert."



[See examples of the adverts our charities produced here.](#)

## THE BENEFITS

**96%**

of trustees say they have learnt new skills

**22%**

got a promotion because of it!

## OF BEING

**73%**

say it has boosted their confidence

**86%**

say it's a good complement to professional and family life

## A TRUSTEE

**84%**

said being a trustee made them happier

**38%**

had new leadership aspirations as a result

**74%**

of women said it improved their confidence



# 3

# Developing your recruitment pack

A trustee recruitment pack is there to provide more information so you don't have to cram everything into an advert.

Your advert will necessarily provide a summary of what the charity does and what you're looking for in new trustees. But it is unlikely to cover everything that a potential candidate will want to know. This is where a recruitment pack comes into its own. It provides a space to provide more detailed information about the charity, its achievements and future plans, and what it expects from trustees.

What do you wish you'd known before you became a trustee? Is it useful to include this in your recruitment pack? Some things you might want to include are:

**What the trustees' role is** – in your context and more generally. For example, do you have an executive team that run the charity on a day to day basis? There are lots of useful trustee role descriptions available but be

**Not every charity will need a recruitment pack. Don't feel that you should produce this for the sake of it, but do what's appropriate for your context.**

mindful that they may include 'jargon' that could deter some people, so you may want to adapt them so the language reflects the 'voice' of the rest of your recruitment pack. You could also signpost guidance produced by the [Charity Commission<sup>4</sup>](#)/[OSCR<sup>5</sup>](#)/[CCNI<sup>6</sup>](#) (as applicable) and the [Foundation for Social Improvement<sup>7</sup>](#) so applicants can find out more.

**The type of people and qualities** you're looking for – professional skills, protected characteristics, lived experience, specific qualifications, interests – and why these are relevant to your charity.

**What's so great about trusteeship?** Perhaps include a quote from an existing trustee about what they value about the role.

**More detail about the charity**, who the other trustees are and their skills and

experience, what the charity does, and any relevant points about its current situation eg. whether it is expanding, developing a new strategy, embedding services after a period of change. Even if you're experiencing some challenges you can frame these positively so that they sound exciting rather than insurmountable! Many new trustees join charities precisely because they are looking for new challenges.

**What the commitment is** in terms of role, time and ways of engaging with the charity. For example, whether it is simply attendance at four board meetings per year or whether there are committees to join, other volunteering opportunities, or a need for trustees to be involved in day-to-day management. Is this a requirement or can the charity be flexible depending on what applicants are able to offer?

**That the role is unpaid** but reasonable expenses will be reimbursed.

**What support will be put in place**, for example, to make board meetings accessible, or to provide training and/or mentoring.

**Whether previous board experience** is needed. Think carefully if you are thinking of including this, as it could significantly reduce your pool of potential applicants. With the right support someone can learn how to be an effective trustee – it may be far more difficult for the rest of your board to develop the skills someone could otherwise bring to the table.

**How to find out** more – for example, on the charity's website or entry on the Register of Charities, or how to arrange a brief telephone call to discuss the role.

**"We now have a full set of resources to continue to use in the future, including an advert, recruitment pack and induction pack. This will really help our succession planning, as we can continue with board recruitment as part of an annual plan."**

WELL WOMEN CENTRE

Even if you're experiencing some challenges you can frame these positively so that they sound exciting rather than insurmountable!  
Many new trustees join charities precisely because they are looking for new challenges.

There are some common questions and concerns that you might want to address in your recruitment pack:

**"I don't know what a trustee is."**

Many people are interested in becoming trustees but don't necessarily understand what it entails – and it will look different depending on the size and type of the charity, and what stage it's at in its development.

**"I don't know if I have enough time to do it."**

The time commitment can vary

significantly from one charity to another. What's involved for your charity and does this relate to just trusteeship or are individuals expected to volunteer in other ways?

**"Trusteeship is just for senior professionals or retired people."**

Trusteeship is not a 'closed shop' or only for older or retired professionals: show that you welcome applications from people from all walks of life.

**"My employer won't want me to be a trustee."**

Some people worry that their employer won't support them giving their time to being a trustee but often the opposite is true.

**"I could be personally liable if I make a mistake."**

This is a common concern but one which rarely materialises.

Incorporated charities – usually charitable companies or charitable incorporated organisations (CIOs) – can enter into

contracts in the name of the charity. If trustees have acted properly but the organisation gets into financial difficulty, the amount individual members have to contribute is usually limited to £1 or £10 – whatever it says in the governing document. There is a greater risk for trustees of unincorporated charities because, technically, the charity acts in the name of its individual trustees. For example, if it takes out a loan the individual trustees are personally responsible for making sure it's repaid.

**As with your advert, make it personal to your charity. Reflect both who your charity is but also what your aspirations are for new trustees.**

Not every charity will need an additional recruitment pack – particularly if you're a smaller, community-based organisation that is looking to attract local people who already know about the charity. Don't feel that you should produce this for the sake of it, but do what's appropriate for your context.

Some people will prefer to talk about the role and application process, so if you're able to provide a named contact for them to speak to instead of a written pack then that can work well too. If you can have both options available, then great but don't make it compulsory for potential applicants to have a conversation!

 [Here are some examples of the recruitment packs our charities produced.](#)

**Some people will prefer to talk about the role and application process, so if you're able to provide a named contact for them to speak to instead of a written pack then that can work well too.**

## "All staff are given five days a year to volunteer"



**Jayne Morris, CEO, TPP Recruitment.**

Jayne was a trustee of Home Start Elmbridge until the end of 2018 and is now an Advisor.

"There are lots of benefits to volunteering, both on a personal and professional level. Becoming a trustee is a unique form of volunteering which brings both challenge and reward. From an employer perspective it is a good idea to encourage Trusteeship for employees – not only can this be about contributing to a great cause it is also good for demonstrating strategic experience, a way to

develop professional networks and learn new skills and increase team working and communication skills.

At TPP all staff are given five days a year to volunteer and Trusteeships are also encouraged and highlighted in company team meetings, one to ones and appraisals."

## CHARITY COMMISSION GUIDANCE ON PERSONAL LIABILITY



**Neal Green, Strategy and Insight Manager, Charity Commission for England and Wales.**

As well as an expert on charities, Neal is an active volunteer in his local church, has served on several voluntary committees and often gives informal advice to friends and family members who are trustees.

"Understanding and applying your legal responsibilities as a charity trustee and dealing with potential risks are the best way to avoid problems and the risk of personal liability.

"Trustees can become personally liable to their charity if they cause or contribute to the charity suffering a financial loss. The law generally protects trustees who have acted honestly and reasonably. The Commission and the courts:

- can relieve trustees from liability if they have acted honestly and reasonably and have not benefited from their actions
- rarely enforce liability on an unpaid trustee who has made an honest mistake

• expect higher standards from trustees who act in a professional capacity or are paid for being trustees

"Trustees who receive an unauthorised payment or benefit from their charity have a duty to repay it. The Commission can't relieve trustees from this duty.

"There is no legal protection for trustees who have acted dishonestly, negligently or recklessly. However, there may be financial protection for those trustees who have made an honest mistake: from a provision in the charity's governing document, trustee indemnity insurance cover or relief from the Commission or the court."



# 4

## Targeting your advertising

How you target your advertising is just as important as what your advert says. The key is to reach the type of people you're looking for.



We've compiled a quick reference guide with useful links to different organisations and networks that may help you advertise your vacancy [here](#). There's further guidance below to help you decide which will enable you to reach your target audience.

### Trustee listing websites

There are various great trustee-listing websites out there that provide a useful platform to advertise your trustee vacancies.

Some target specific skills – for example:

- **Reach Volunteering** enables you to specify particular professional skills that you're looking for: <https://reachvolunteering.org.uk/charities-non-profits/find-trustee>
- **Bar in the Community** advertises trustee vacancies to lawyers and others who are legally qualified: <http://www.barinthecommunity.org.uk/>
- **ICAEW** (the Institute for Chartered Accountants in England and Wales) and CABA have a dedicated **volunteers website** aimed at individuals with finance and business skills: <https://www.icaewvolunteers.com>

**"It's good to diversify where you advertise as you are then able to reach a much wider audience and attract potential trustees of different ages and life experiences"**

TRUSTEE, HOME START  
DOVER AND DISTRICT

[icaewvolunteers.com](https://www.icaewvolunteers.com)

- **The Honorary Treasurers Forum** can also reach individuals with finance experience: <http://www.honorarytreasurers.org.uk>
- **The Media Trust** helps connect charities with individuals working in PR and creative industries: <https://mediatrust.org/communications-support/access-media-volunteers/how-to-recruit-a-media-volunteer/>
- **CIPD** (the Chartered Institute for Personnel and Development) enables charities to **post voluntary roles** for free to attract individuals working in HR: <https://peoplemanagement.haymarketrecruitment.com/register/>

Others are more generalist so may not help you narrow your search down so easily but will reach the people who don't fit such specific categories. Some are paid-for but many will enable charities to post their voluntary roles for free. Here are a few examples:

- **Do-it/Small Charities Coalition:** <https://do-it.org/channels/trustee-finder> (free)
- **CharityJob:** <https://www.charityjob.co.uk/> (free for voluntary roles)

- **The Big Give:** <https://secure.thebiggive.org.uk/> trustees (free)
- **Women on Boards:** <https://www.womenonboards.net/en-GB/Home> (free)
- **The Guardian Jobs:** <https://jobs.theguardian.com> (charge)
- **Third Sector:** <https://jobs.thirdsector.co.uk> (charge)
- **Civil Society:** <https://www.civilsociety.co.uk/post-a-jb.html> (charge)
- **NCVO Trustee Bank:** <https://www.ncvo.org.uk/practical-support/information/governance/trustee-bank/vacancy-search> (free to NCVO members, charge for enhanced service)

#### Proactive, direct advertising

Trustee listing websites reach those who already know they want to become a trustee. Although it's not an approach you'd necessarily use for recruitment of paid staff, carrying out some proactive advertising directly to your target audience can bring people on board that wouldn't otherwise have taken the first step to becoming a trustee. This was the case for some of the people recruited through the Trustee Recruitment Pathways programme.

Your skills audit (however formal/informal) provides your shopping list of who you want to attract. Use that information to help you identify where the people you're trying to attract 'hang out' – where do they spend their time, what type of media do they look at and where will they see your advert? For example:

- **Workplaces** and large local employers – they will often have departments and individuals with the skills you're looking for eg. HR, IT or operations.
- **Business parks** and chambers of commerce that give you access to a range of business contacts.
- **Business networks** and membership bodies eg. [the Society of Black Lawyers<sup>8</sup>](#) or [Women on Boards<sup>9</sup>](#).
- **Professional bodies** or associations for particular skills such as fundraising, HR, marketing or PR

experience.

- **Charities** that work with beneficiaries that have the attributes you're looking for eg. those with a disability or lived experience of a particular issue. You can use the advanced search on the [Charity Commission's Register of Charities \(England and Wales\)<sup>10</sup>](#) to find charities local to your area. You can also [search OSCR's register<sup>11</sup>](#) for charities in Scotland and [filter CCNI's register<sup>12</sup> for charities in Northern Ireland](#).
- Publications, websites or online networks relating to **specific professions** or groups eg. [the Institute of Fundraising's special interest groups<sup>13</sup>](#).
- **Social media** and interest groups, to reach out to a wider digital network or using paid-for (but low-cost) advertising eg. LinkedIn, Twitter and Facebook.

 We've put together a handy guide to using LinkedIn for trustee recruitment [here](#).

#### Food for thought

If you're proactively reaching out to individual companies or networks it can be crucial to find a "gatekeeper". These are individuals who have decision-making authority or can connect you with the relevant contact within the organisation. This might be someone you already know who works for the organisation, the general contact listed on their website, or a senior member of staff you can see listed on their website or LinkedIn.

## "Our five new trustees bring passion and skills "

"In terms of the methods we used:

- Email to existing trustees and staff with the recruitment pack
- Post on Facebook, Twitter and local Facebook pages
- Post on CharityJob, Big Give, Do It and ICAEW websites
- Direct emails to Mental Health Trust and local digital marketing agencies to get people from specialist agencies.

The trustees we recruited comprised: a mental health specialist who had a historic connection with the charity and responded when we contacted the Mental Health Trust; a charity digital marketing manager through the Do It portal; a local businessman who we had some contact with as a corporate partner and was

excited about the opportunity of being involved more strategically; and a communications professional who had applied for one of our paid roles but fitted more appropriately as a trustee.

We had not explicitly advertised the trustee role previously and had recruited purely by word of mouth. Undertaking this process (developing an information pack, advert and marketing the opportunity) enabled us to think about the trustee role, the benefits both to the organisation and to the potential trustees themselves and to package this in a way that clearly communicated this. By spreading our net further, we have been fortunate enough to recruit trustees that are both passionate about our cause and bring specific skills and experience to help our charity develop further."

#### TRUST LINKS LTD

- f. **Career Volunteer** which runs a programme preparing and placing emerging and established leaders in board roles in not-for-profit organisations.
- g. **Recruitment agencies:** not an option for every charity but if you have the budget this is something to consider. Examples include TPP, Hays, Prospectus, Oxford HR, Harris Hill, Green Park, Inclusive Boards and Trustees Unlimited. Reach Volunteering also provide an executive search service to help recruit trustees called [Trustee Works](#).

**"We realised networks can do more than we first thought – using the people you already know to help get the word out is really easy!"**

CANAAN PROJECT

#### **Making the most of your network**

Using open trustee recruitment methods doesn't mean throwing the baby out with the bath water and ditching your existing network of contacts. Instead, think about how you can use your network more creatively, and use it to get the word out about your advert rather than simply asking those you know personally to apply. For example, if you want a trustee with experience of social work, who do you know who may have connections within this sector? Your neighbour may be a social worker or you might have a friend who's had contact with social services through voluntary work they do. You can then ask them what networks exist locally, or who they could recommend contacting that can circulate your advert to social workers or others with relevant experience or background in a similar field.

#### **Tailoring your advert**

As well as targeting where you advertise, you may want to tailor the format of your advert so that it resonates more with your target audience. For example, it may be more effective to produce a video ad to attract a trustee with digital skills rather than a physical poster. Younger people may be more drawn to a graphic or meme on social media than a listing on a trustee finder site.

#### **How long to advertise**

In your advert it's really helpful to include a deadline for applications, to prompt individuals to apply (unless you will consider applications on a rolling basis). The application period needs to be long enough to give a sufficient number of people time to see the advert and ask questions, but short enough that those interested in the role are motivated and reminded to apply. We've found that 4-6 weeks is a

good timeframe to use, although this will also depend on the advertising methods you've used and the time of year. If you're proactively contacting a large local employer then make sure this works with the date it will be circulated by them to its employees.

If you find that you don't have a suitable range of applicants then you can always extend the deadline or re-advertise, knowing that you've already got the advert and recruitment pack ready. Don't forget to let existing applicants know – and progress their application in the meantime, if you can, so that they don't lose interest.

Remember to take your advert down once you've recruited! It can create a poor impression to see a very old advert and is frustrating for applicants that apply only to find out you've already appointed new trustees. If you're using trustee finder sites many will enable you to set a specific date range for your advert.

#### **Finding what works for you**

It is unlikely that one single recruitment method will capture large numbers of applicants. Nor will it be practical or proportionate to try out every method available. Your recruitment campaign is about quality not quantity so try out 3 or 4 different methods for targeting your advert to see what generates a reasonable number of good candidates. You could see what interest you receive initially and then try another 2 or 3 methods if you haven't generated as much interest as you'd hoped. And remember that what works for one campaign might not work next time, if you're looking for different skills.

**"One trustee came through Twitter, another I found at a concert after making an announcement. The third trustee has come through because of some press and publicity."**

NEW NOTES PROJECT

**"We used our networks in a different way – and recruited two trustees!"**

"The Canaan Project is a youth work charity founded in Tower Hamlets by a local church and inspired by our Christian faith. We wanted to recruit an experienced youth worker to our board (as one of the skills we'd identified). We initially struggled to think where we might advertise to encourage applications from people

with the right experience. But we then realised that we already had links with many relevant networks including: London Youth; a Christian youth work network; and an umbrella body for Christian charities, many of which work with young people. We hadn't thought of these networks as possible sources of trustees before."

CANAAN PROJECT



**It's important to keep track as you go through the recruitment process and afterwards – of the interest and applications you've received. This helps you to keep in touch with applicants during the process and to identify recruitment methods that worked particularly well for you that you might want to use in future. Once you've finished your campaign you can capture this information in summary form so you don't need to retain personal data.**

# Looking for specific skills?

Here are some ideas for reaching out to commonly sought-after skills and experience.





## “Local advertising found us four new trustees!”

“When we were advertising for our Trustees we found that advertising in parish newsletters/websites, gave us the best response. I think this is due to the fact that we have attracted people who have retired and are able to have access to their local parish magazine and were looking for something to fill their time with. Also local parish magazines use a variety of ways to reach

their local community. Some parish magazines still use the paper version which is put through the door, others use the online version. Using this method is often a free way of advertising. The most we had to pay for an advert was £5. We also corresponded with an actual person and have managed to build a relationship with them for future advertising needs.”

**HOME START DOVER AND DISTRICT**

# 5

# Converting interest into applications

During Trustee Recruitment Pathways, some charities reported that they'd had initial interest from individuals that didn't then translate into applications. Here are some tips for converting interest into applications:

**Limit the number of steps** in the process to as few as possible – particularly if you're a smaller, local charity. If the recruitment process seems daunting or onerous, what impression does this give about actually becoming a trustee?

**Give timelines** to applicants and make sure they're clear about the process.

If you can ensure they'll be available, **give a named contact** to speak with potential applicants by telephone or in person. Alternatively, make sure whoever is answering queries from individuals is well-briefed on the role and the application process.

**Actively encourage good people** to apply; don't assume that they will just because they made a telephone call to

find out more. Be clear about how they need to apply, as they may think they have applied just by making the call.

Similarly, if applicants are using a trustee finder site they might have clicked an 'apply for' button. **The charity may** just receive a short message so **not realise that the individual considers** that they've submitted an application if it may have routed through to someone else in the charity.

**Reinforce your messaging** by ensuring that your advert is available through a variety of channels including on your website and social media. This also gives an individual the best chance of applying, as they don't need to remember where they initially saw the advert.

**"I set up informal chats with the CEO and Chair of the board before applying which was really interesting. I learnt a bit about myself and my motivation for being a trustee."**  
A NEW TRUSTEE

**Remember** that the application process is as much about potential candidates testing out whether you're the right fit for them as it is about you attracting the people you want. Ensure each

interaction they have with you is a positive one. **Respond to queries quickly** and helpfully and don't leave existing applicants hanging if you have to extend deadlines or change interview dates.

## “Our charity is quite niche, but we had lots of interest”

“Yachad is a charity that works within the Jewish community to build support for a political resolution to the Israeli-Palestinian conflict. The work that we undertake is highly sensitive, and it limits where we can recruit trustees from, as those that sit on the board of the organisation have to be highly engaged in both the issue and the community in which we are working. Despite our limitations on recruiting trustees, we realised we hadn't invested enough time in making sure we had potential new trustees to replace those coming off the board, and therefore we needed to do a larger recruitment drive.

The Director and Chair of the organisation attended a Getting Recruitment Ready workshop which enabled us to set aside time to put

together an advert which we could use to recruit trustees. We circulated the advert within our current networks and amongst supporters. We had excellent feedback with many people coming forward expressing interest. This has enabled us to narrow down a list of 7 new trustees that we now are working with to bring onto our board over the coming 12 months, and we also have a wider list of people, so when we need to recruit in the future, we have a pool of people that we can potentially recruit from which should enable us to find new trustees more quickly. Taking part in Trustee Recruitment Pathways forced us to set aside the time to actually consider the process of recruitment properly, and we were also able to gain expert input into our recruitment advert which enabled us to successfully advertise and recruit for trustees.”

**YACHAD**

As part of your charity's programme of events you could consider holding an open day or providing individuals with the opportunity to join an advisory group or volunteer with the charity.



**"Understanding the charity's needs and the candidate's interests and how these interact, through a conversation/discussion is sometimes much better than a formal interview process."**

A NEW TRUSTEE

**"[It was] fairly straightforward and typical of recruitment processes: good and clear instructions and paperwork, a robust interview process."**

A NEW TRUSTEE

# Shortlisting and interviewing

**Remember, it's not about the number of applications you receive but the quality of applications, and whether prospective trustees meet the criteria you're looking for.**

Depending on the number of applications received you might need to do some shortlisting. At the planning stage of your campaign you can decide who will carry this out. Ideally, they will receive applications that have been anonymised to minimise unconscious bias.

You can find some useful tips on shortlisting [here](#).

For both shortlisting and interviewing it is important to be clear from the outset about what criteria you are using to assess applications, including which are essential and which are desirable. This will help you to treat applicants fairly and prioritise those that most closely match what you're looking for. This should tally with the person specification you put together, based on your skills audit.

## A friendly chat

Regardless of how many applicants you have you should interview them, whether they are already known to the charity or not. This ensures everyone is treated fairly and, even if a candidate is already known to the charity, gives both parties a chance to learn more about each other and why they'd be a good fit. However, this doesn't have to be a

formal interview panel but could instead be a friendly chat over coffee or a telephone call. Again, choose what is appropriate for your charity.

Give some thought at the outset to where interviews will be held, whether there are suitable facilities for those with mobility issues and/or whether you will use technology (such as video-conferencing) or ask candidates to meet face to face.

You will need to decide who will conduct the interviews and it should be the same person or people for all candidates. The Chair would usually be involved in interviewing and possibly other trustees and/or the CEO if you have one (although bear in mind they are essentially recruiting their own boss!)

You might also ask an independent person to join the panel, who has more expertise in the skills and experience that you're looking for in candidates. For example, your charity's web designer or Communications Officer for digital and/or marketing, professional advisers for legal or accountancy, or a service user or friend who has lived experience of your charity's cause.

You can invite your expert to give their recommendation on the choice of successful candidate(s) but the final say on who to recommend for appointment or election should rest with current trustees.

#### Involve beneficiaries

There are also several options available to involve the people your charity supports in the recruitment process.

One way is to ask a beneficiary to sit on the interview panel. Other options include inviting candidates to meet with some of your service users informally (either before the interview or separately) or to visit the charity's services. This will help you to gauge how candidates interact with the most important people in your charity.

When it comes to interviewing, don't assume that everyone on the panel has recent experience of carrying out this type of interview. Make sure each person is briefed and that everyone has a copy of the questions you will ask.

## Structure for the interview itself

- Provide an outline of what your charity does and why you're recruiting for new trustees.
- Give a summary of how the interview will work and explain what you are looking for and why; note that you don't expect to appoint all applicants (which will manage expectations and provide reassurance to candidates that aren't appointed).
- Ask them if they would like you to explain the role of a trustee, to ensure that there is a level playing field for those who have been a trustee before and those who have not.
- Ask each of your prepared questions but try and keep the atmosphere relaxed and conversational.
- Leave plenty of time for them to ask questions
- Confirm what the next steps will be (eg. that you have another couple of interviews at the end of the week but expect to notify candidates of the outcome within the next week). You may also want to reiterate the process for formally appointing or electing new trustees and the relevant timescales

**"There is a demand for trustees and more opportunities than potential candidates are aware of."**

A NEW TRUSTEE

 We've produced some sample questions as well as a template interview sheet to use for each candidate [here](#).

All candidates should be asked the same basic questions, but you can then ask follow-up questions and probe further to gain more understanding. Ask for specific examples to demonstrate each candidate's experience. Even if they haven't been a trustee before, they may have used comparable competencies in a different context, which they can describe to show they would be suitable.

**"The involvement of users of the charity's services was invaluable to me as a candidate and the organisation. It was one of the biggest selling points for me and the most enjoyable part of the recruitment process."**

A NEW TRUSTEE



It is useful to take notes, and to give a score for each question, as it's unlikely you will remember all the answers each person has given. This will help you to compare notes with others on the panel, ensure you're treating each candidate fairly and confirm the extent to which each person has met the criteria you're looking for.

Remember that the interview stage is as much an opportunity for applicants to test out the charity as it is for you to find out more about them. Why not use it as a chance to show off the great work that your charity does? Whether they are ultimately successful or not, the process should be enjoyable for all candidates. Even if they do not join your board, the experience they have is likely to shape whether they apply for other trustee roles in future. And they may still become a supporter of your cause. There may be other things that you want

Once the interview process is complete and you've decided on which candidate(s) to appoint, remember to inform unsuccessful candidates quickly as well as those you've selected. They have put time and effort into applying.

to include during or after the interview stage. It is becoming increasingly common for boards to invite potential trustees to observe a board meeting before both sides decide on the appointment, although this would only be for candidates that you already know you're highly likely to appoint. This can provide an invaluable insight but should be timed carefully to avoid delaying the recruitment process unnecessarily. You will also need to think about what is on the agenda and whether there are any

**"Thanks to Getting on Board, we have managed to recruit three incredible people and they are already having an impact."**

HEART UK

sensitive or contentious issues that would not be appropriate to discuss with a visitor present.

Candidates should also be clear that any discussions are confidential, and be briefed on how they are expected to conduct themselves. For example, they may be invited to introduce themselves to trustees at the start of the meeting but then simply observe without making any other contributions. If you decide to offer a board observation, it may also be helpful to arrange a follow-up conversation with the Chair to deal with any questions they have.

Once the interview process is complete and you've decided on which candidate(s) to appoint, remember to inform unsuccessful candidates quickly as well as those you've selected. They have put time and effort into applying to be a trustee and even if they aren't the right fit for your organisation at this time it's important that they have a positive experience of the process so that it doesn't deter them from applying for other trustee roles.

 We've put together a template email you can use to inform those candidates you've decided not to appoint [here](#).

Sometimes 'wildcard' applicants can bring skills you hadn't outlined but turn out to be incredibly useful. The key is to be able articulate clearly what they have to offer.

**A potential trustee would only usually observe one board meeting. Some charities have used the term 'visiting trustee' to refer to individuals that actively contribute and influence board meetings (and possibly vote on items) but have not 'officially' joined the board. We would advise against this practice: if someone is essentially fulfilling the role of a trustee and significantly influencing board decisions then they may still be regarded as meeting the statutory definition of a trustee even if they don't think they've been formally appointed.**

#### Which candidate?

You may also find that you have a very impressive applicant (on paper and/or in person) but they don't fit the person specification you set out and have different skills to the ones you were looking for.

You should prioritise those candidates that more closely fit the skills and other qualities you're looking for. But you could also look at whether you have sufficient room on the board (including under the terms of your governing document) to appoint an additional candidate.

Don't feel you have to restrict yourself strictly to a pre-defined list of criteria if you've got scope for some flexibility: sometimes 'wildcard' applicants bring skills and experience that you hadn't outlined in your skills audit but who turn out to be incredibly useful to the charity. The key is to be able articulate clearly what they have to offer and why they

You should prioritise those candidates that more closely fit the skills and other qualities you're looking for. But you could also look at whether you have room on the board to appoint an additional candidate.



THE FDF CENTRE FOR INDEPENDENT LIVING

should join your board. Of course, this assumes that you have successfully recruited! As with paid staff, it is generally better to appoint no-one than to appoint the wrong person. If you don't feel any of the candidates are suitable then feel confident to politely turn them down and go back out to advertise. Although this can seem like a lot of work, it is likely to involve less effort than having to manage a trustee that isn't a suitable fit for the charity.

#### And finally

For your chosen candidate(s) there are a couple of final actions to complete before you formally appoint them:

- Take up references – this might include one professional reference and one personal one.  
 We've produced a template reference request [here](#).
- Ask all new trustees to complete the Charity Commission's trustee declaration to confirm they are eligible to serve as a trustee and are not automatically disqualified. You can download a copy [here](#).
- Obtain [DBS checks<sup>14</sup>](#) if required.

**"Don't recruit just because somebody has shown an interest in your organisation – they have to have the correct skills/experience. Taking the time to think about what we actually wanted before rushing ahead really helped us to focus."**

TLC: TALK, LISTEN, CHANGE



# Actually getting people onto the board

The way you formally appoint trustees will be set out in your charity's governing document. You must follow this to ensure your trustees are validly appointed.

At the outset of the process when you were planning your recruitment campaign you should have confirmed how trustees are appointed or elected in your charity. For some charities, the trustees can appoint other trustees at any time; for others, some or all of the trustees are elected by the charity's members at the AGM; some may also have third parties that have the right to appoint or nominate individuals to serve as trustee(s).

There may be other criteria that trustees are required to meet; for example to be a member of the charity. This doesn't

necessarily need to be a barrier, as a person can often become a member at the same time that they join the board of trustees.

 We've produced more detailed guidance about the process of appointing trustees [here](#). The Charity Commission also provides useful guidance in [CC30: Finding New Trustees<sup>15</sup>](#).

However they are appointed, it is important to confirm to the individual in writing that they have been appointed and the date this comes into effect.

Any appointment should be made subject to suitable references (if not already obtained) and confirmation that they have not been disqualified as a trustee.

 Use our [template letter](#) to confirm a trustee's appointment which also provides information about the induction process.

Once you've appointed your new trustee(s), the Register of Charities should be updated as soon as possible to include their name and provide the Charity Commission with relevant information such as their contact email address for the Commission's use only. If your charity is a company then their appointment as a company director will need to be filed with Companies House. You should also update other stakeholders eg. your staff, service users and volunteers, and update your website if you provide details of your trustees there.

If your trustees are elected by your membership or nominated or appointed by a third party this doesn't have to prevent you from advertising for trustees or recruiting for specific skills. You can include in a briefing to your members the type of skills and other qualities that your board needs and possibly recommend specific individuals to your members that you've identified through open recruitment. Even if you are recruiting from within your existing membership, the same principles still apply about identifying people with the skills you need, making trusteeship accessible, and seeking to be diverse.

Update your trustee details with [the Charity Commission](#), and/or [CCNI<sup>16</sup>](#) (depending on where your charity is registered) and [Companies House<sup>17</sup>](#) (if your charity is a company). If you're registered with OSCR you can just update your trustee details annually when you file your accounts.

There might be some other practical things to think about; for example, whether they need to be added as a signatory to your bank mandate. If your charity is unincorporated then any land may be held in the names of individual trustees and so this information will need to be updated with the Land Registry.

**The method that you need to use to formally appoint trustees, including the notice period required for meetings, will be included in your charity's governing document. You will need to factor this into the timeframes that you use.**

**Induction is important for all trustees, particularly if through open advertising you've attracted good candidates that have less existing knowledge of the charity or haven't served as a trustee before.**



You've put so much effort into a great recruitment campaign so don't squander the great first impression you've created with your new trustee(s): make trusteeship of your charity a good experience from the start, with a comprehensive induction.

## Induction: don't fall at the final hurdle

When you update the Register of Charities with details of your new trustee(s) they will now receive a welcome pack from the Charity Commission by email. This provides links to a range of useful Charity Commission guidance, but this can also seem a bit daunting, particularly if this is their first trustee role. You can see what's in the welcome pack [here](#).<sup>18</sup>

The induction the charity itself provides will be just as important and can really help new trustees to settle in quickly and start making a difference for the organisation from the outset. Although induction can often be an overlooked part of the recruitment process it is important for all trustees, particularly if through open advertising you've attracted good candidates that have less

existing knowledge of the charity or haven't served as a trustee before.

If you've recruited multiple new trustees at the same time then this can also bring advantages to the induction process. For example, saving time by being able to carry out inductions collectively and/or provide relevant information to several trustees at once; new trustees may provide additional support to one another and may feel more confident to say if they don't understand or agree with something, or to ask for help in developing into their role. However many trustees you've recruited – and whether their induction is provided collectively or 1:1 – make sure that it provides them as individuals with the tools they need to thrive in their new role.

If you've recruited multiple new trustees at the same time, this can bring advantages to the induction process.

#### A well-thought out induction:

- Sets the tone for your future relationship – it reinforces the impression that the charity is well-run and shows that you are serious about the important contribution trustees have to make.
- Manages expectations of both trustees and the charity about the role and commitment.
- Helps trustees get up to speed quickly.
- Builds board cohesiveness between new and existing trustees.

As with other aspects of your recruitment campaign, your induction process should be tailored to your specific context. Why not ask existing trustees what

they wished they'd known or what they'd recommend you include?

An induction won't necessarily happen all at once and may span across a new trustee's first 2-3 months, and can include a mix of documents to read, meetings with key individuals, and visits to some of the charity's services. This can help them develop their understanding although we'd suggest that you start the induction sooner rather than later.

There are a number of documents that should also be provided to all trustees, particularly when they join the board:

## Trustee inductions: what to include

- **Time with the Chair** either face to face or by telephone. This gives the new trustee(s) the chance to ask any questions they didn't feel able to raise before their appointment, confirm mutual expectations and initial thoughts about what they think they can offer, and for the Chair to provide a briefing ahead of the first board meeting about relevant context to discussions.
- Explain **the organisation's history**, work, current priorities/challenges, acronyms, key stakeholders and external environment. Some of this information might already have come up during the recruitment campaign but it is worthwhile to provide a recap as your new trustee(s) might not have taken it all in. This also helps to put your new trustee(s) on a level playing field with other trustees in terms of their knowledge so they can hit the ground running.
- A briefing meeting with **key senior staff and/or volunteers**. For example, executive staff might provide a verbal briefing on current priorities for their department, performance against strategic objectives, and an overall picture of how the charity operates in practice.
- An opportunity to **meet with the full board**.

This will include their first trustee meeting – and it might be helpful to have name cards out. But it can also include informal or social opportunities such as a board dinner, or lunch before a meeting.

- A chance to **experience the organisation's activities** and meet with those the charity supports. If this is possible, providing your new trustee(s) with an opportunity to visit some of your services or meet with those it has helped can help to put theory into practice. It can also ignite a greater passion and enthusiasm for what the charity is trying to achieve.
- **A follow-up call** with the Chair to capture the new trustee's first impressions. This may be after their first board meeting, or a couple of months into the role. It can be helpful in evaluating the recruitment and induction process as well as priorities they may have observed for how to develop the charity's governance. It also acts as a follow-up to your initial conversation, about how your new trustee(s)' skills might be used to help the charity and any ideas they have for future developments, contacts or partners now that they've learnt more about the charity.

# An induction won't necessarily happen all at once and may span across a new trustee's first 2-3 months.

- [OSCR guidance \(Scotland\) – Trustee Duties<sup>20</sup>](#)
- [CCNI guidance \(Northern Ireland\) – Running Your Charity guidance<sup>21</sup>](#)
- [Link to the Charity Governance Code.<sup>22</sup>](#)

 [Here are some examples of induction packs our charities produced.](#)

#### Other practicalities

On a practical level, it is also useful to ensure that you:

- Give new trustees access to any Board portal or shared drives (and that former trustees are removed) so that they can access documents electronically and/or obtain the latest versions of policy and other documents.
- Share contact details for key individuals including other trustees and the CEO.
- Ask new trustees to complete a register of interests so that it is easier to manage potential or actual conflicts of interest or loyalty. All trustees should be asked to update this annually.
- Give the name and contact details of the person who deals with the logistics of trustee meetings.
- Provide a copy of the expenses policy and claim form.
- Provide details of upcoming events and important dates (eg. board meetings, AGM)



including the date, time and location.

- Ensure your new trustee is aware of any trustee indemnity insurance policy in place.

Keep all of your trustee recruitment and induction resources in one place so that they're easily accessible. It sounds obvious, but if, for example, you don't have paid staff you may not have these systems set up.

#### Ongoing trustee development

Once your new trustee(s) have completed their initial induction you may want to provide them with further training – which could be offered to all trustees on an ongoing basis. Some examples of

**"The new trustees are very keen to see the organisation grow and be part of that journey."**

HOME START DOVER AND DISTRICT

the options available include:

- An online trustee training course. For example, ICAEW (The Institute of Chartered Accountants in England and Wales) now offers a six-module course to individuals who join its [Volunteering Community](#)<sup>23</sup> (open to anyone); the Society of Trust and Estate Practitioners (STEP) has also developed an online course called [The Informed Trustee](#)<sup>24</sup> for charity trustees.
- A range of guidance and training is available through umbrella bodies and sector organisations – see <http://trusteesweek.org/training/> for details.
- Many charity law firms and CVSs provide free or low-cost seminars on key topics such as the role and legal duties of charity trustees.
- Other conferences and training events are available (at cost) such as the [NCVO Trustee Conference](#)<sup>25</sup> and [Trustee Exchange](#).<sup>26</sup>
- Your charity could also arrange a bespoke trustee development day which is tailored to your charity and facilitated by an external governance adviser.



# Looking ahead

“We now have a board with a wide range of skills and feel far more prepared to face the future. This has coincided with us reviewing our strategic plan and our new board members have had a full role in that. We all have a shared vision and have the skills within our board, staff and volunteer team to put it into action.”

WELL WOMEN CENTRE

## “I love being a charity trustee”



**Lynn Cadman, author of this report for Getting on Board.**

Lynn is a trainer for Getting on Board and a trustee of a local charity in Haringey, North London, and BMS World Mission.

“I love being a charity trustee. There are some days when it’s difficult because tough decisions need to be made or I have to manage the role alongside other competing demands on my time but it is incredibly rewarding and fulfilling. I’m in a genuinely privileged position where I have a special insight into the amazing work that the charity does, access to great leaders that I can learn from, and the humbling experience of realising that my small

contribution has added value and helped the organisation to function just that little bit better, producing even greater impact for our beneficiaries.

“And because I was appointed (in part) because of the professional skills I have, I’m challenged to think how I can use those skills for the charity and have an opportunity to develop professionally in a non-work context.”

We hope this guidance gives you lots of practical tips on finding new trustees and encourages your board to try out something new for your next trustee recruitment campaign.

We’d suggest that you evaluate your campaign once your new trustees are in post, to reflect on what has worked well and capture whether there is anything you would do differently next time. This could include input from your new trustee(s) as well as the rest of the board and others involved in the recruitment campaign. Once you’ve done it once, open trustee recruitment should be easier next time round too!

Not all of the charities in the Trustee Recruitment Pathways programme recruited all the trustees they wanted first time round. But the resounding feedback was that the time and effort they invested in the recruitment process was well worth it and that open trustee recruitment is definitely the way forward.

Each charity out there has been set up to meet a need, to make the world a better place, to preserve something beautiful, to enrich quality of life. They can only do that to their best if they have a leadership with the rich mix of skills, experience and backgrounds that they need for this stage in their journey.

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Your new trustees are waiting to be found. Where are you going to start?

# Some statistics from the Trustee Recruitment Pathways programme

**80%** of charities in the programme said they'd previously had trouble attracting new trustees. Of the **20%** that had successfully recruited previously, **83%** wanted to ensure they had the right mix of skills for the future.

**74%** successfully **recruited new trustees** during the programme.

Those charities recruited **55 trustees** having received **111** applications between them. Some recruitment campaigns are ongoing.

Before the programme, **43%** of participating charities felt partly or **well-equipped** to deal with the challenges their charity is facing.

This increased to **85%** at the end of the programme.

**68%** of participating charities felt they were better equipped to deal with challenges facing their charity than before.

**40/55** trustees were recruited by the **15** charities that used **>3** different recruitment methods.

Before the programme, **57%** of charities felt their board was representative or partially representative of their service users.

This increased to **70%** after the programme.

## The three most common 'critical success factors' reported by participating charities were:

1. attending a 'Getting Recruitment Ready' workshop with Getting on Board
2. identifying the specific skills and experience needed
3. producing a carefully thought-through advert.

**35%** of charities felt their board was **more representative** of service users now.

**65%** of charities felt their board was **more diverse** now.

**30** charities took part in the Trustee Recruitment programme.

**23** charities provided survey responses to Getting on Board for both a baseline survey at the start of the programme and a final survey at the end of the active recruitment phase of the programme. The findings above derive from both surveys. The number of participating charities was not large enough to be statistically significant but these results provide some interesting findings. It seems fair to conclude that there is a direct correlation between good open trustee recruitment and success in finding the skills, knowledge and experience that a charity needs.

## Endnotes

- 1 Getting on Board research report: The Looming Crisis in Charity Trustee Recruitment - [www.gettingonboard.org](http://www.gettingonboard.org)
- 2 Research commissioned and published by the Charity Commission: Taken on Trust – The Awareness and Effectiveness of Charity Trustees in England and Wales - [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/658766/20171113\\_Taken\\_on\\_Trust Awareness\\_and\\_effectiveness\\_of\\_charity\\_trustees.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/658766/20171113_Taken_on_Trust Awareness_and_effectiveness_of_charity_trustees.pdf)
- 3 [www.gettingonboard.org](http://www.gettingonboard.org) and our resources page [www.gettingonboard.org/charities](http://www.gettingonboard.org/charities)
- 4 Charity Commission - CC3: The Essential Trustee: What you need to know, what you need to do - <https://www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3>
- 5 The Scottish Charity Regulator (OSCR) – Trustee Duties - <https://www.oscr.org.uk/managing-a-charity/trustee-duties>
- 6 Charity Commission for Northern Ireland (CCNI) – Running Your Charity guidance - <https://www.charitycommissionni.org.uk/charity-essentials/running-your-charity-guidance/>
- 7 The Foundation for Social Improvement (FSI) – The Essential Trustee Series - <https://www.thefsi.org/services/essential-trustee-series/>
- 8 <http://societyofblacklawyers.co.uk/>
- 9 <https://www.womenonboards.net/en-gb/home>
- 10 <http://apps.charitycommission.gov.uk/showcharity/registerofcharities/AdvancedSearch.aspx>
- 11 <https://www.oscr.org.uk/about-charities/search-the-register/register-search>
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- 15 <https://www.gov.uk/government/publications/finding-new-trustees-cc30>
- 16 <https://www.charitycommissionni.org.uk/manage-your-charity/update-your-charitys-details/>
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- 20 <https://www.oscr.org.uk/managing-a-charity/trustee-duties>
- 21 <https://www.charitycommissionni.org.uk/charity-essentials/running-your-charity-guidance/>
- 22 <https://www.charitygovernancecode.org/en/front-page>
- 23 <https://www.icaew.com/groups-and-networks/communities/volunteering>
- 24 <https://www.step.org/qualifications/informed-trustee>
- 25 <https://www.ncvo.org.uk/events/trustee-conference>
- 26 <https://www.civilsociety.co.uk/events/trustee-exchange-2019.html>

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# Thank you!

# Our participating charities:

- Age UK Knaresborough & District
- Beyond Me
- Bridgend County Borough Citizens Advice Bureau
- Canaan Project
- Cambridgeshire Deaf Association
- Carmarthen Youth Project (Dr M'z)
- Community Action Norfolk
- Community in Partnership Knowle West
- Derbyshire LGBT+
- First Give
- HEART UK – The Cholesterol Charity
- Home Start Dover and District
- IMARA
- New Note Projects
- Newport Credit Union Ltd
- Peer Power Youth

- Sandwell African Caribbean Mental Health Foundation
- Salford Lads' and Girls' Club
- The Climate Coalition
- The FDF Centre for Independent Living
- The Life Centre Bierley Community Association Ltd
- The Rape & Sexual Abuse Counselling Centre (Darlington and County Durham) CIO
- The Wiener Library
- TLC: Talk, Listen, Change
- Trust Links Ltd
- Well Women Centre
- Young Citizens (Citizenship Foundation)
- Women's Work Derbyshire Ltd
- Yachad
- Young Minds

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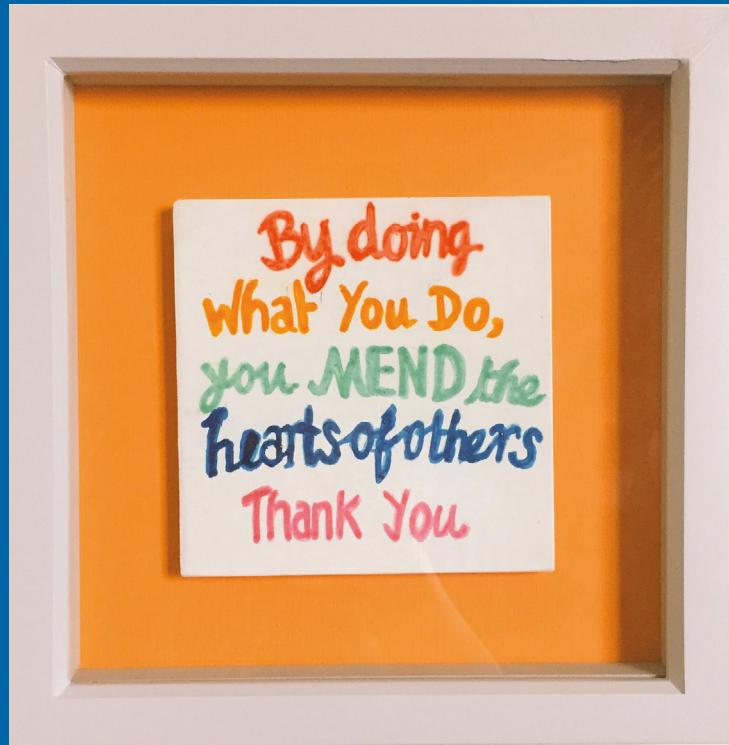
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