



## Trustee Recruitment

We all know how difficult it can be to find the “right” people to join a governing body. We have often heard people say, “We’ve asked people, but no-one is willing to do it”, “People join but they don’t put the time in”, or “Our Trustee board has had the same people in it for many years and new people just don’t seem to fit in”.

It is very important to give yourselves the best chance of being ready to welcome new members; finding the right people, in the right location, with the right skills and with the free time to commit to your organisation. To maximise your chances of success, we recommend that you follow the steps described in **NCVO’s Trustee Recruitment Guides**. (See the links at the end of this article)

We know that this works – in 2009, MACC carried out a board recruitment process using the NCVO Guide, and successfully recruited several new Board members!

We have summarised the steps below, to give you a flavour of what is involved:

### **Step 1 - Plan the Process**

The board needs to work together, to agree that new members are needed and to plan how they should be recruited. It may not be possible or appropriate for every Trustee to be involved in the whole process. There is a lot of work involved and important details can easily be overlooked. You may decide to nominate a small working group to make sure the process is taken through to its conclusion - but make sure that everyone is kept involved and informed along the way.

### **Step 2 - Check the Legals**

Do you know what your governing document or constitution says about who can and who cannot become a member of your governing body? Check this first, as it may contain unexpected restrictions. (We can help you to check yours if needed). For example, no-one under the age of 18 can be a trustee of a charitable trust or an unincorporated association. However a person under 18 can be a director, and so a trustee, of a charitable company. Some people are disqualified by law from acting as Trustees. For further information on this, go to [www.charity-commission.gov.uk/publications/cc30.aspx](http://www.charity-commission.gov.uk/publications/cc30.aspx) (Section E).

### **Step 3 - Prepare the Board for new Trustees**

a) *Is the Board Ready?* Is the current Trustee group equipped to deal with current and future challenges? Do all the current Trustees agree that new people are needed? If not, this could jeopardise the success of the whole process. Is the Board



willing to review and make changes to its operations to accommodate new members?

b) *Representation and Diversity*: Is the current Board representative of the community in which your organisation operates? Does it reflect the diversity of the population it serves? Is it inclusive and diverse enough to take on and welcome new members? Is it representative of relevant stakeholders, such as users/beneficiaries? The NCVO Guide contains a Diversity Perception Questionnaire to help you assess this.

c) *Skills Audit*: What particular skills and experiences do your current Trustees bring? What skills gaps are there? Are new skills required as a result of changes in the external environment? The NCVO Guide includes a Skills Assessment Matrix to help you look at your future priorities for action as a Board - and whether you have the necessary skills to deal with them.

#### **Step 4 - Plan for Diversity**

This involves thinking about the potential barriers that may prevent a more diverse range of representatives from the local community getting involved with your organisation. You may need to take steps to address these barriers before trying to recruit. The Guide provides an exercise to help you look at what the potential barriers might be in your situation and what solutions could be found.

#### **Step 5 - Describe the Role of the Trustee**

It is extremely important that a new or potential Trustee understands what is expected of them and has a clear role to step into. You need to decide what kind of experience and skills the person you are seeking should have, and be able to describe approximately how much of their time the role is likely to take up. This means anyone considering the role will be able to make an informed decision as to whether to apply or not. Taking time to consider what you are looking for in a new Trustee helps you to recruit the right person and also to recognise them when they do apply! The NCVO Guide helps you to draw up a Role Description, Person Specification and to create a “Portrait of your Ideal Trustee”.

#### **Step 6 - Promote Your Vacancy**

Think creatively about how and where you will promote your vacancy. Most people think about what having a new Trustee will do for the organisation – but have you thought about what being involved would do for them? What benefits or gains could you offer them? What motivated your current group of Trustees to get involved (and stay involved?) What could you offer in terms of access to training and / or personal and/or professional development? The NCVO Guide advises on how to write a good advertisement, the different ways to promote your vacancy and how to create an



information pack for anyone who responds to your advertisement, including an application form.

### **Step 7 - Select Your Trustee**

New Trustees are an important resource and will be with you for a number of years – so plan carefully how you are going to select the right people from those who have applied. You may need to carry out a shortlisting process – using an objective score sheet based on the qualities and skills you are looking for. Plan how you would interview the strongest candidates; how to make the interview process informal and enjoyable, and what questions you would ask. There are plenty of examples in the NCVO Guide.

### **Step 8 - Complete the Formalities**

Completing the formalities is one way of making sure the decision you have made about selection has been the right one and nothing has been overlooked. You should check any legal aspects, take up references, ask the successful candidate to sign a Declaration of Eligibility and check any conflicts of interest. Remember to thank all those who applied but were not selected – they may be willing to take on another role in the organisation. You will need to inform all relevant parties that a new Trustee has been appointed. A “Formality Checklist” is included in the NCVO Guide.

### **Step 9 - Induct Your Trustee**

Planning a thorough and thoughtful Induction Programme can make all the difference when welcoming a new Trustee to the organisation. This is a good opportunity for everyone in the organisation to get involved, to get to know the Trustee and show their passion and commitment to the organisation. Ask for suggestions of events, activities and celebrations that the new Trustee can get involved in. Make time to work with them on understanding and shaping their role. The NCVO Guide includes an Induction Programme Planner.

### **Step 10 - Evaluate the Recruitment Process**

Taking time to review what you have done and how it could be improved upon will help to make the recruitment process more effective next time. Did you find people with the right mix of skills and experience? How did they feel about the process and what would have helped them more? Record the learning points that emerge, so that they can feed in to the process next time. The NCVO Guide contains an Induction Effectiveness Questionnaire.



The full NCVO Trustee Recruitment Guide can be found at:

<http://www.ncvo-vol.org.uk/Guide-downloads-good-practice-trustee-recruitment-Guide>

NCVO also has a similar guide specifically for Small Organisations:

<http://www.ncvo-vol.org.uk/trusteerecruitmentforsmallorganisations>

The Charity Commission also provides guidelines and advice on good practice in Trustee Recruitment:

<http://www.charity-commission.gov.uk/publications/rs10annexs.aspx>