



# Enrich your board with the right trustees

A guide to trustee recruitment  
May 2021



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**Note on NCVO links:** the National Council for Voluntary Organisations (NCVO) has a wealth of resources to help you through your trustee recruitment process. These are currently free to download from their website, but you will need to [register](#) on their site first. This will mean that the NCVO links within this document won't be downloadable for you unless you have registered/logged in to their website.

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### Introduction

We have recently been through the process of recruiting new trustees to our board and hope that this guide will support you in this task if you have found yourself in the same position.

You may be recruiting because you have vacant trustee positions to fill, or are simply hoping to reinvigorate your board by attracting new members with different skills, experiences and perspectives from those you already have. You may be seeking to broaden the makeup and diversity of your current members, or even looking for some of your new trustees to take up special roles such as Honorary Treasurer or even Board Chair. Although recruiting new trustees is an exciting prospect, these challenges can, at first, appear a little over-whelming.

Knowing where to start with this recruitment process can be daunting both in terms of the time commitment needed to attract and recruit high calibre candidates, and also needing to navigate the wealth of external resources out there to find the information you are looking for.



We hope that this guide will support you with this task, by providing you with a step-by-step, easy to follow format which includes useful resources. We have also shared some templates we produced when we conducted our own recruitment, alongside other helpful resources we used. We have included these throughout each stage of the process and have also summarised them at the end of each section for ease of reference. You could use these templates as a guide and adapt for your own organisation's purposes, or design your own incorporating the key points.

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## Step 1: Plan the process

It is important to have a plan in place so that you can work out a realistic timeframe for your recruitment process. If completed thoroughly, following this guide as best practice, you should plan for a three to four month process taking you from planning to appointment stage.

Having a plan also allows you to identify who will manage the process and is a good way of keeping everyone informed about progress against each stage. We have shared our [Milestone plan](#) with you which we followed step by step and found to be realistic in terms of time required to complete each stage. This can be adapted to suit your needs.

In addition to having a plan, you will need to discuss your ideas and expectations for recruitment alongside anyone who is going to be involved in the process. With this in mind, we recommend getting a meeting booked in to discuss this as soon as you can. You could use our [Planning questions to ask yourself sheet](#) as a guide to aid your discussions.

Lastly, don't forget to consult with your governing documents which should set out the procedures for electing or appointing new trustees. You will need to ensure your chosen methods of recruitment are permitted under your legal framework. Use [NCVO's governing document checklist](#) as a prompt to what you are looking out for. [The Charity Commission](#) has all the latest guidance about who is eligible to become a charity trustee and a current list of those who are exempt.

### Step 1 resources:

- [Milestone plan](#)
  - [Planning questions to ask yourself sheet](#)
  - [NCVOs governing document checklist](#)
  - [The Charity Commission](#)
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## Step 2: Identify your gaps and needs

You will need to discuss with your senior management team and board chair, how urgent you feel your appointment is and whether you wish to temporarily recruit or 'co-opt' someone into the role on a short-term basis. Again, you will need to consult with your governing documents to

ensure this is permitted and that you are following the correct procedure. Whatever your chosen method, we would recommend that formal recruitment is undertaken at some stage to ensure an open and transparent process has been available and accessible to all.

### **Trustee skills assessment**

Consider running a trustee skills assessment to help identify what qualities you are looking for from your new recruits. NCVO have produced a [Board Assessment Matrix](#) which could be utilised and there is a similar [Example Skills Audit](#) available by Lloyds Bank Foundation. We have also included our own [Trustee Skills Audit](#) which could be adapted to suit your requirements. Don't forget to liaise with the wider board as to whether there are any particular skills or areas of specialist knowledge they are looking for. We certainly had some valuable suggestions when we canvassed the views of our wider board members.

### **Board diversity**

Another key part of this second step is to think about the diversity of your board and assess how you would like to address this issue. Having reviewed the diversity of our own board, we were certainly keen to develop its makeup, but weren't sure how to do this. We started by looking at the population breakdown of the local geographical area to determine what the current demographic makeup looked like. We would recommend this as a good starting point to determine which groups you may wish to encourage applications from to try to redress any imbalance.



The next question for us was how to go about trying to attract applicants from these groups in a fair and legal way. We sought advice from our in-house HR experts who provided a useful document which may help you with this: [Diversity & Inclusion when recruiting new trustees](#).

NCVO has also produced some useful guides: [Identify and address obstacles to diversity](#) and [Review your board diversity](#).

### **Step 2 resources:**

- [NCVO's Board Assessment Matrix](#)
- [Lloyds Bank Foundation Example Skills Audit](#)
- [Trustee Skills Audit](#)
- [Diversity & Inclusion when recruiting new trustees](#)
- [NCVO's Identify and address obstacles to diversity](#)
- [NCVO's Review your board diversity](#)

### Step 3: Describe the role of trustee

Once you have put in the background work involved in the earlier stages, you should find putting together the application pack much easier.

You will first need to describe the role of trustee and what skills and experience you are looking for in a role description and person specification. You will need to do this separately for each of the different types of roles you are recruiting for, as you are likely to require a slightly different set of skills for each. There are a few helpful templates out there to get you started including:

[NCVO's What are you looking for in your new trustee?](#)

and [NCVO's Sample trustee role description](#). We have

shared the ones we developed here with you too which

you could adapt for your own purposes: [Community First Yorkshire's trustee role description](#) and [Community First Yorkshire's treasurer role description](#).



You will need to check whether you are legally permitted to request that a DBS check is undertaken for the different roles you are recruiting for and if so, which level of check will be required. A helpful tool to support you with this is the Government's [DBS eligibility checker](#). This information should be included within your person specification in order to inform the candidate whether this is essential to the role.

Your next task involves deciding upon an application process for your candidates to follow and putting together the rest of the documentation you are choosing to include within your application packs. Here are some useful checklists for what should be included in an application pack: [NCVO Application Pack Checklist](#) and [Lloyds Bank Foundation Application Checklist](#).

We decided upon a letter of application as opposed to using our standard application form, which didn't seem to fit for the purposes of recruiting trustees. You may however choose to go down the route of asking for an application to be completed. If you do, you might find [NCVO's sample application form](#) useful. We did still use our other standard HR forms including confidential details and equal opportunities forms. You will have your own as standard as part of your usual recruitment processes.



### Advertising your role

One of the other fairly detailed documents you'll need to work on is the advertisement for your role. This is important as it must grab the attention of potential candidates and encourage them to submit an application with your charity as opposed to any other organisation advertising for similar roles. Again, we would recommend producing a separate advert for each role so that, when they are uploaded onto job sites, they can be searched for easily by role. You may also need

to develop a one-page version of your adverts if they go onto more pages as some sites require this or have word limits in some of the editable fields. Don't forget to include key information: closing date for applications, interview date and key contact information for queries or informal discussions. Here is [NCVO's guide to the do's and don'ts for writing an ad](#) to get you started and our own [trustee](#) and [treasurer](#) adverts which might help you get started.



To pull your pack together, and provide an introduction to your organisation and board, it is a good idea to produce a cover letter from the board chair. The letter can also give detailed instructions for applicants about how to apply and what they should submit as well as including any other resources you'd like to direct them to. Here is our [Signed Chair's Cover letter](#) which you could adapt.

We have also provided links here to some of the additional resources we would recommend you include within your application packs: [CC3 The Essential Trustee](#) and a precis of this, [The Jigsaw](#). These documents act as additional resources to allow potential candidates to assess whether the roles they are applying for are right for them. There is also a [Sample declaration form](#) and [Reasons for disqualification table](#) which you may choose to include to alert potential candidates to the fact that they will be required to sign this form upon appointment. Please ensure you use the most up to date forms and guides by taking them from the [Charity Commission](#).

### Step 3 resources:

- [NCVO's What are you looking for in your new trustee](#)
- [NCVO's Sample trustee role description](#)
- [Community First Yorkshire's role description trustee](#)
- [Community First Yorkshire's role description treasurer](#)
- [DBS eligibility checker](#)
- [NCVO Application Pack Checklist](#)
- [Lloyds Bank Foundation Application Checklist](#)
- [NCVO's sample application form](#)
- [NCVO's guide to the do's and don'ts for writing an advert for trustee recruitment](#)
- [advert for treasurer recruitment](#)
- [Signed Chair's Cover letter, CC3 The Essential Trustee](#)
- [The Jigsaw](#)
- [Sample declaration form](#)
- [Reasons for disqualification table](#)
- [www.gov.uk](#)
- [The Charity Commission](#)

## Step 4: Promote your vacancy

This stage is all about creating a promotions strategy to inform people you are recruiting. You will need to decide who you are hoping to target and how to reach them. We found [Lloyds Bank Foundation's list of recruitment sources](#) really useful at this stage of the process. One extra resource we would like to recommend is our online volunteering directory, [Volunteering in North Yorkshire \(VINY\)](#). You can find and advertise volunteering opportunities for free. Please [contact us](#) if you would like to advertise a vacancy and we will be more than happy to help.



Other things to think about at this stage are whether you are going to incur advertising costs and if so, this is a good time to get these agreed by the relevant person within your organisation. It may also be useful to involve your marketing and communications team at this stage. In doing so, you can alert them to the fact you may need their help in advertising the vacancies, particularly on social media and you will gain their valuable expertise about where might be good places to advertise. Your recruitment may even fit within a wider organisation marketing campaign, helping to raise its profile to a higher level.

You will have completed a lot of hard work up to this stage and you are now ready to go live with your adverts!

### Step 4 resources:

- [Lloyds Bank Foundation's list of recruitment sources](#)
- [Volunteering in North Yorkshire \(VINY\)](#)

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## Step 5: Select your trustee

While your adverts are live, it is time to give some thought to the shortlisting and interview stages. You will need to agree your interview panel members, if you haven't done so already, and consider whether an independent person should join to alleviate the risk of any sub-conscious bias. You may also want to consider including specialists for certain positions e.g. senior finance staff for recruiting a new treasurer.

It is a good idea to design a bespoke shortlisting scoring sheet to support your panel with their shortlisting exercise and to ensure a fair and transparent process has been followed when selecting those candidates you'd like to invite for interview. To help you with this task you may wish to use [NCVO's Create a shortlisting scorecard](#) or [Community First Yorkshire's shortlisting scoring sheet](#) which we developed specifically for this purpose. Once the vacancy has closed you will need to send the applications to the panel in their chosen format, alongside this scoring sheet to enable them to select which candidates they feel best meet the essential and desirable criteria.

Once shortlisting has taken place, you are ready to set up and hold your interviews. You will need to prepare and agree interview questions and/or a task with the panel. NCVO have developed a range of useful documents: [Interview Questions and criteria](#) and [tips for trustee selection methods](#). In addition, [Reach Recruitment](#) have some useful ideas about interview questions on their website. We have developed a set of [general trustee interview questions](#) ourselves and also a set of [interview questions for the role of treasurer](#). These documents could be used as ideas to create your own set of relevant questions.

You will need to inform selected candidates of details of your interviews (or open sessions with the panel if you are including this stage), noting any preparations required. You will notice from our [template job advert](#) that we detailed the interview date to give candidates plenty of notice.

Once you have held interviews and made your selection, it is time to notify your chosen candidate/s of the good news. Give some thought to their first appointment with you. This could be an induction session, familiarisation meeting or invite to the next board meeting.

#### Step 5 resources:

- [NCVO's Create a shortlisting scorecard](#)
- [Community First Yorkshire's shortlisting scoring sheet](#)
- [Interview Questions and criteria](#)
- [Tips for trustee selection methods](#)
- [Interview questions and criteria](#)
- [Reach Recruitment](#)
- [Community First Yorkshire's trustee interview questions](#)
- [Community First Yorkshire treasurer interview questions](#)
- [Community First Yorkshire template job advert.](#)

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#### Step 6: Complete the formalities

Now that you have recruited some excellent new trustees, it is time to confirm them in post. Lloyds have a useful checklist to guide you with this process: [confirmation of a new trustee](#). Before you can formally appoint your new trustees, you will need to check they are eligible. [The trustee declaration of eligibility form](#) will need to be signed. It is helpful to make sure you are up to date with the [Charity Commission's rules](#) around eligibility and automatic disqualification of trustees and consult with their advice on vetting trustees.



If it has been deemed necessary to complete a DBS check, you will need to instigate this process. References will also need to be taken up at this stage too.



In the meantime, you will need to send out a letter of appointment (which should be subject to all of the necessary checks coming back as satisfactory) and introductory letter from the chair, including details of their induction.

You will also need to give consideration as to when the best time is to inform key stakeholders such as staff members and charity members, and you will need to make an announcement to the board.

Once you have conducted the official checks, it is time to make changes to the relevant documents. We have included some useful checklists for you to ensure you capture them all: [Lloyd's Formalities: whom to inform and what to update](#), [Lloyd's Confirmation and Induction checklist](#) and [NCVO Formality and notification checklist](#).

#### Step 6 resources:

- [Confirmation of a new trustee](#)
  - [The trustee declaration of eligibility form](#)
  - [Charity Commission's rules around eligibility and automatic disqualification of trustees advice on vetting trustees](#)
  - [Lloyd's Formalities: whom to inform and what to update](#)
  - [Lloyd's Confirmation and Induction checklist](#)
  - [NCVO Formality and notification checklist](#)
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### Step 7: Induct your trustee

You will need guidance from the board as to how detailed the induction you would like to provide for your new trustees should be, as the time they have available to spend time with them will be a



big factor in this. There is a range of useful documents your new trustees can familiarise themselves with which could be put together for them as an induction pack. This will allow the new trustee to get to know about the role, the charity and their legal responsibilities. NCVO have developed a useful [induction pack checklist](#) to help you to decide which key documents will be relevant to provide, as have [Lloyds](#). We have also drawn upon these checklists to develop our own [trustee induction pack template](#). NCVO have also provided an [induction programme planner](#) which

will be useful if you are planning on a more detailed induction programme.

Community First Yorkshire deliver training sessions for new trustees and also provide a treasurers' network, both of which will be valuable resources for you to signpost to as part of your induction. Take a look at the wide range of trustee training that we have on our [website](#).

Once you have set up and delivered your induction, you may wish to seek feedback on the effectiveness of this or any other parts of the recruitment process to develop these processes in the future. NCVO have provided an [Induction effectiveness questionnaire](#) which will be a useful resource for this.

#### Step 7 resources:

- [NCVO's Induction pack checklist](#)
  - [Lloyd's Induction pack checklist](#)
  - [Community First Yorkshire's trustee induction pack template](#)
  - [NCVO's Induction programme planner](#)
  - [Community First Yorkshire's training programme](#)
  - [NCVO's Induction effectiveness questionnaire](#)
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#### Useful sources and credits

[Lloyds Bank Foundation](#)

[NCVO](#)

[Charity Commission](#)

[Voda](#)

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#### Additional support

Community First Yorkshire can help you with many aspects being a trustee from understanding your roles and responsibilities, essential trustee finance and running an AGM. Simply fill in an [enquiry form](#) and we'll get back to you. You can sign up for our news bulletins [here](#):

- Our monthly Funding Bulletin lists updated funding opportunities.
- Our weekly newsletter has information about the charity sector, including training.



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