

How to find and keep good trustees

All charities depend on trustees to handle important tasks and effectively govern the organisation, yet many charities struggle to fill their vacancies. This guide aims to help you recruit and retain trustees who will have a positive impact on your Board.

Actions at a glance...

- * **Reflect** on what skills and experience the Board needs
- * **Plan** your recruitment process and draft a role description
- * **Advertise** the role and share it widely
- * **Interview** the best candidates
- * **Induct** your new trustee
- * **Evaluate** the process for future refinement

REFLECT

Do you need to advertise?

Many organisations recruit new trustees by simply asking people they know, but if you want a good mix of trustees with the skills and qualities to lead your charity effectively - and who are genuinely committed to the task - it makes sense to extend your search more widely. Being intentional about when and how to recruit can make a really positive difference to what your Board looks like.

What skills does your Board need?

By openly recruiting for the role, you can reach a far wider pool of potential trustees and target the specific skills, knowledge and experience your charity needs at any given time. It may already be evident that you need someone with an understanding of a particular subject, or it may be less clear what is needed. In which case, a skills audit of the current Board can help identify any gaps.

➔ *Reach Volunteering has some handy information on how to conduct a [skills audit](#).*

Alternatively, you could ask your trustees what skills they think are needed to meet the charity's challenges and realise its strategy over the next few years.

Knowing what skills and experience you would like will help you write a 'person specification' and give you something to assess potential candidates against. It will also help you draft a role description and write your recruitment advert.

PLAN and ADVERTISE

Writing the advert

Your advert will need to appeal to the people you want to attract, and should be engaging and persuasive. You don't need to include everything at this stage, just enough to get people's interest. You might consider having the role description on your website and directing candidates there for more details, both about the role and your organisation. Alternatively you could create a recruitment pack which includes your mission and vision statement, your current strategy and the trustees' annual report. Extracts from funding bids can also help to explain your impact and services.

You should then think about where you will find the type of person you are looking for. As well as nationwide recruitment sites such as reachvolunteering.org.uk and charityjob.co.uk you can post your advert on kentvolunteers.org.uk, on LinkedIn, your Facebook page, on the village noticeboard and publicise with local businesses. Don't forget to share it with your supporters too!

→ Take a look at [other charities' adverts](#).

How to attract under-presented candidates

Your trustees may have identified a need to diversify the Board, so how do you appeal to candidates who are under-represented or have no prior experience? It could be as straightforward as stating 'previous Board or trustee experience is not necessary and we welcome applications from all ages and backgrounds'. Or you might choose to be more explicit in who you would like to hear from. For example, 'we would particularly welcome applications from... ..as we want our Board to be more representative of our community.'

Increasingly, service-led charities are recruiting people with lived experience as trustees. This helps to ensure the Board makes decisions that lead to relevant and effective support for the charity's clients.

Trustees with lived experience of the cause on charity boards can add insights, increase collective understanding and stimulate thinking, ensuring richer discussion and more sophisticated solutions

Bayes Business School

Remember to make the role description and other necessary information available in accessible formats. If that's not possible, make sure candidates can request a copy from by phone or email instead. Accessibility should apply to the whole recruitment process, including the interview and subsequent appointment of a trustee.

→ Discover the benefits of lived experience on a trustee Board at [Bayes Business School](#).

INTERVIEW

The interview process

After shortlisting those candidates who have the right skills and experience, it's time to invite them to an interview.

This is typically led by the Chair and may also involve another trustee or staff member. Inviting candidates to meet with some of your service users informally beforehand will also demonstrate how they interact with the most important people in your charity.

The interview is not dissimilar to a typical job interview. After putting the candidates at ease, outlining what your charity does, and explaining who you are looking for and why, you should ask your set of prepared questions and invite them to ask theirs. You should then conclude by confirming what the next steps will be and how long that will take.

Appointing your new trustee

After checking the references of your chosen candidate and asking them to sign the Charity Commission's [trustee eligibility form](#), you might also need them to complete a DBS check. You will then follow the procedure stated in your charity's governing document of how to formally appoint a trustee, after which you can update the Charity Commission and Register of Charities with the new trustee's details.

INDUCT

Don't forget the induction!

Regardless of whether your new trustee is familiar with your charity or has been a trustee before, it is always worthwhile giving a full induction. Not only does this ensure they have all the knowledge and information they need to be effective in their role from the outset, but it will also make them feel involved and appreciated. Ensure they have access to relevant documents such as the minutes from the last few meetings; the charity's policies and procedures; and Board Terms of Reference. Schedule meetings for them to meet key individuals and members of staff, and organise any necessary training. Also consider other practicalities such as giving them access to any shared drives; sharing the contact details of other trustees and key individuals; giving them a copy of your expenses policy and claim form; and informing them of forthcoming Board meetings.

If you have recruited someone who has not been a trustee before, you could also pair them with a buddy or mentor to guide them in their new role.

TOP TIPS

- * Don't make the role too burdensome
- * Keep the role description succinct
- * Give people the chance to ask questions about the role
- * Give people who don't fit all the criteria other ways to be involved
- * Consider recruiting more than one first-time trustee at a time
- * Aim to make each step of the process a positive experience

To conclude...

Trustees are critical leadership roles: it's worth investing the time to find the right people who will ensure your charity thrives.