

Guide: Recruiting and retaining trustees

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Introduction

Recruitment is hard. This is true of any role, but even more so of one that combines significant responsibility with no financial reward! If you recruit well, you can secure good trustees – but it takes thought and organisation. Every charity can build a strong board if it invests time and effort in recruitment and retention.

There are four stages to finding and keeping great trustees: preparation, recruitment, induction and review. This guide will take you through each step.

You can look at individual steps or download the whole guide as a pdf.

Preparing for trustee recruitment

Successful trustee recruitment depends as much on preparation as on interviews and induction.

Planning

First, plan the recruitment process including:

- a timetable, including the closing date for applications and date(s) for interviews
- who is going to be involved and what they need to do

- what budget is available to support the process.

Identify skills and experience

Carry out a [skills audit](#) (if you haven't done one recently) to determine gaps in the skills and experience within your board, bearing in mind what you may be losing if a trustee is leaving. Also identify any skills you will need to carry out any known plans for the future.

Consider the diversity of your board. Is it broadly representative of the community, users and members your organisation serves? A board will be more effective if it understands the needs and wishes of the charity's staff and the people who benefit from its services. In addition, having trustees with a mix of backgrounds, approaches and perspectives is proven to lead to better decision-making.

Use the audit to determine what you are looking for in a candidate, including skills, experience and background, and split your requirements into what is essential and what is desirable. Agree this with the board from the outset to reduce the chances of disagreement later on.

Create an information pack

Create an information pack for applicants that includes:

- a summary of the role (feel free to adapt our model role descriptions)
- a list of any specific skills and experience you are looking for
- an overview of the organisation and its priorities for the next two to five years
- details of how to apply for the role and how the appointments process will work.

At the same time, you can start to prepare an induction pack for the successful candidate (See below for details.)

Final checks

Before advertising the vacancy, check any legal restrictions, such as limits on the number of trustees, the process for nomination and terms of office, and ensure you are aware of any restrictions on who can and cannot be a trustee. Also ensure you have a process for responding to all applications and any queries from potential applicants – a speedy response will help you to 'sell' your vacancy (and it is a condition of using the Reach community that you reply within five working days).

The recruitment process

Successful recruitment happens when you say clearly who you are and what you're looking for, and do so in the right places.

Where to list your vacancy

By using our online service, you can reach thousands of people who have chosen to volunteer, and you can promote this listing on social media too. Opportunities on our website are also promoted on LinkedIn – reaching its millions of highly skilled professional users. You can also use our service to approach volunteers directly who look like they may be a good fit.

Other options for promoting your vacancy include advertising, brokerage agencies, volunteer agencies, local noticeboards and your own website and newsletters, as well as word of mouth.

Review and interview

As soon as possible after the deadline, review the applications to create a shortlist, based on your original requirements. Don't be swayed by impressive credentials if the person does not match your needs. Similarly, don't overlook skills and expertise that could be useful, just because of the way they are presented.

Meet and interview prospective candidates, both to sell your organisation and to establish their capabilities and suitability. Give them plenty of opportunity to get to find out about your organisation, its work and other board members – this could include an open day and/or informal meetings with the chief executive and/or chair.

References and checks

When you've chosen the 'best' candidate, make the appointment "subject to references and checks". Always take up references and carry out appropriate checks before confirming any appointment. Also, before confirming the appointment with the candidate, you should:

- arrange a visit for the successful candidate to meet the board and senior staff
- fix a date for them to observe a board meeting
- agree the appointment at the appropriate board meeting.

You can then:

- tell both the successful and unsuccessful candidates
- send the induction pack to the new trustee
- register the new trustee with the Charity Commission, if appropriate
- issue a press release, if appropriate
- complete the induction process and carry out a review with the new trustee after three to six months.

Interviewing trustees

Interviews play a vital role in finding the right candidate for your organisation, so it's important to get them right. Interviewing for a trustee role has some similarities with employee interviews, but significant differences too.

Interview objectives

When you meet someone who wants to become a trustee for your organisation, it is important to get to know them and find out why they want to get involved with your organisation, what experience they have and what their expectations are.

The recruitment process is also an opportunity for candidates to look closely at your organisation to find out if it is one they want to commit to and if the board is a team they can work with. So give the candidates opportunities to: ask questions; have informal meetings with the chair and/or CEO; and attend 'open days' or visit the organisation to see its work in action.

Be honest

It is important to 'sell' your organisation to candidates during an interview, but you should also be clear about the challenges they may encounter and the commitment you need them to make.

Ask searching questions

The right candidate will respect you for conducting a thorough and professional recruitment process, and for asking probing questions. It signals that you are serious about your governance. However, candidates are offering to take on significant responsibility for your organisation for free, so turn down unsuccessful candidates gently.

Key areas to cover

Interviews offer an opportunity for you to tell an interviewee more about your organisation, as well as for you to find out more about them. We suggest you include questions that cover:

- How much do they know about your organisation?
- Do they fully understand your mission, vision and strategic direction?
- Do they fit in with your organisation's ethos?
- Do they understand the role and responsibilities of being a trustee, and the difference between governance and management?
- What skills and qualities does the candidate bring?
- Do they have the capacity and willingness to commit sufficient time to the role?

For more ideas about questions to ask at an interview, go to the [resources section of our recruitment process page](#).

Induction and post-recruitment review

New trustees need to feel welcomed and informed. Giving them time to learn about the organisation and key information will help them become an effective member of

the board more quickly. Poor induction is one of the most cited reasons for individuals stepping down prematurely.

Supporting a new trustee

Consider offering the new trustee a ‘buddy’ – an existing board member who can mentor them through the first few months.

They should also be given an information pack of key documents containing:

- the governance documents
- your strategy
- latest annual report and accounts
- a calendar of board and committee meetings
- minutes of previous year’s board meetings
- a list of current trustees plus short biographies
- organisational structure and senior staff biographies
- background history of the organisation
- up-to-date organisational strategy/operating plans
- policy documents including:
 - expenses policy
 - conflict of interest declaration
 - volunteering policy
- summary of funding and projects
- outline of main relationships with other organisations
- information about trustee training and development
- useful resources such as [The Code of Good Governance](#) and [The Essential Trustee](#).

It’s also useful to include examples of your marketing literature, business cards and any publications you have issued recently.

Review

After the appointment, review your recruitment process. What worked well and what could have worked better? What will you change next time?

After three to six months you should also review how your new trustee is settling into their role and how well the new board is working. Ask your new trustee for feedback on the induction process and whether they feel this is this right role for them. Then evaluate if there are changes that are needed on the board overall, and whether the skills and experience of each trustee are being used effectively.

Links to other useful resources

About trustees and boards

[The Charity Commission website](#) is a good starting point for all information about trusteeship.

[The Essential Trustee](#) (guidance provided by the Charity Commission on the Gov.uk website) provides an excellent overview of the duties and responsibilities of a trustee.

[The Charity Governance Code](#) is a clear, accessible and practical tool to help charities and their trustees develop high standards of governance. It is widely considered to be the standard to which all trustee boards should be working and is easy to put into practice.

[Financial governance: a gentle guide for the non-financial charity trustee](#) is an excellent introduction to charity finances from ACEVO and Rathbones Investment Management.

[Trustees' legal responsibilities and liabilities \(PDF, 96KB\)](#) has been written for us by Russell Cooke LLP to give an expert view of the legal responsibilities of trustees.

[The Charity Governance Awards](#) shine the spotlight on good governance in the charity sector. Categories include diversity and inclusion, embracing digital and managing turnaround. The stories of the winners and shortlisted charities offer useful lessons in how boards can lead effectively.

[NPC publications](#) from charity think tank NPC cover different facets of governance.

[UK Charity Trustees](#) is a LinkedIn group open to any trustee or anyone interested in becoming a trustee. It is moderated by Reach and the Small Charities Coalition.

For chairs, treasurers and company secretaries

[Model role descriptions for chairs and trustees](#) can be found on our website – this includes role descriptions for treasurers and other specific trustee roles.

[The Association of Chairs](#) is a membership body that produces useful guides to support chairs of charities and non-profit organisations to lead their boards effectively, including:

[A Chair's Compass](#) – a practical guide for chairs

[A Question of Balance – a guide to the Chair and Chief Executive relationship](#) which covers how to manage the relationship between the chair and chief executive.

[The Honorary Treasurers Forum](#) is a membership organisation offering information, support and networking to treasurers.

[ICSA: The Governance Institute](#) trains, informs and represents the interests of governance professionals across all sectors.

About Reach Volunteering

Reach Volunteering connects people, skills and good causes.

We are the leading skills-based volunteering charity in the UK and the single biggest source of trustees in the UK.

We connect charities with the skills and experience they need to make more of a difference. We inspire individuals to use their skills for social good, and to make the most of great volunteering and trustee experiences.

reachvolunteering.org.uk

Appendix 1: Doing a skills audit

An effective charity board has trustees with a good range of skills and qualities, and a variety of professional and personal experience. The ideal mix will depend on the nature of the charity, but having a diverse board – where trustees have different experiences and perspectives – will help to ensure the board will make well-rounded decisions.

A skills audit is a useful tool for mapping out the skills and expertise of trustees to see if you have the right mix and to identify any gaps in the board's overall skills. It will also let you see how it may be affected if a trustee leaves or your charity faces any new challenges.

When to do a skills audit

The most common time to do a skills audit is when you recruiting new trustees. However, skills audits should be done regularly – at least annually – because your trustees' skills and experience will change, and you will be able to respond more quickly when you need new trustees if you already have an up-to-date skills register.

What an audit should cover

Your board needs the expertise to:

- exercise overall control of the organisation's current business operations
- manage the charity's resources responsibly
- set the strategy and oversee its implementation
- ensure that the needs of your organisation's beneficiaries are put first
- keep the charity true to its purpose.

Skills audits are good for reflecting on the functional skills that your board needs. They can also focus on other aspects of your board, such as diversity. Does your board reflect the community that you serve in terms of gender, age, ethnicity, disability, lived experience and/or class? Is there a role for service users on your board?

How to do a skills audit

You can do a skills audit in various ways. You could ask each trustee to complete a printed or online audit and then you could collate the results. Alternatively, the chair could complete the audit as part of an annual face-to-face appraisal with each trustee. Or you could ask an external advisor to undertake an audit.

We have a sample skills audit that you can use or adapt for your charity.

Skills audit template

Organisation name:

Who will lead the skill audit	<i>Name</i>	<i>Comments</i>
Who will be involved in the process	<i>Name(s)</i>	<i>Comments</i>
How is confidentiality being managed?		
What are our resources?		
Our timescales		
	Dates	
Reviewing new activities (step two)		
Meet with trustees and review their skills (step three)		
Complete evaluation (step four)		
Skills audit complete by		

Think about the activities that your organisation plans to undertake over the coming year.

Do you have any specific objectives that need to be met? What new skills are required? (For example, policy, marketing, legal, etc.)

Area of work	Skill(s) needed	Who has the skills to do this?

Individual trustee skills audit

The following should be filled out by each member of the board to identify the skills they bring to the organisation.

Name

Level of expertise: 1 = highly experienced, 2 = proficient, 3 = some experience, 4 = no experience

Skills, expertise, knowledge qualifications	Level of Expertise				Comments
	1	2	3	4	
Administration					
Board/committee experience					
Campaigning					
Change management					
Charity/voluntary organisation governance					
Conflict resolutions					
Customer care					
Digital					
Enterprise/business development					
Facilitating meetings					
Finance					
Fundraising					
HR/Training					
Income generation					
Influencing					
IT/systems					
Leadership					
Legal					
Listening					
Marketing					
People management					
PR/communications					
Project management					
Property					
Relationship management					
Service user/beneficiary of the organisation					
Team development					
Voluntary sector experience					
Other (Specialist experience or qualification relevant to voluntary organisations e.g. medical, campaigning, advice, etc.)					

Motivation

Do you have a particular interest or reasons for being/wanting to be a trustee of this organisation?

Diversity

A diverse board is able to reflect and support the delivery of an organisation's mission. Do you have a specific service user experience, social or family experience, background or general interests that will help us support the goals of the organisation?

Areas or work

Are there any areas of the work of the organisation you have a particular interest in and/or would like to become more involved in?

Skills audit evaluation

Reflect on the information obtained in previous two templates. This step is to help you assess the current board in relation to your organisation's objectives and potentially identify skill gaps.

1. Do you have a clear map of the existing skills and knowledge among trustees within the organisation?

YES

NO

2. What key skills have you identified in the existing Board?

Skills identified

-
-
-

3. What are the mid-term/long-term objectives of your organisation?

Organisation's objectives:

-
-

4. Is our Board of Trustees diverse enough? Are there gaps? What can we do to make it more diverse?

Identify skills needs

Reflect on the existing skills of your current board against the skills needed in order to achieve the objectives of the organisation.

What skills do you need in order to achieve the mid-term/long-term objectives of your organisation?

Skills needed	Do we have this skill at present? Yes/No

Next steps

This section is for you to list the actions that follow your evaluation.

What do you need to do next to ensure your trustee board has all the skills required?

You may consider the following: Reviewing policy procedures, recruitment of new trustees, training/further development of board members, etc.

Action	Date to be completed by

Final reflections

Reflect on the skills audit process and use this information for future skill audits.

What was successful about the skills audit?

What would you do differently on the next skills audit? (Include reasons if you ticked No in Question 1)

What actions do you need to take forward to the next skills audit?

Appendix 2: Model role descriptions

All boards must have a chair and a treasurer. These post holders play a crucial role in ensuring that your charity is well governed, and recruiting the right people will make a huge difference to your board.

Trustees hold joint responsibility for governance, but boards often have trustee roles with a specific focus, and which require a particular skill set.

We have created some model role descriptions (find these in the [recruitment process section](#) of this guide online) to help you recruit to the following positions.

Chair

Treasurer

HR trustee

Marketing, communications & PR trustee

Fundraising trustee

Campaigning and political activity trustee

Digital trustee

They are generic descriptions – so please use them as a starting point and adapt them to the needs your particular board.