

# INFORMATION SHEET 2.8

## INDUCTING A NEW TRUSTEE



For committee members to work effectively and feel they are contributing fully to the running of the organisation there needs to be a proper system of induction for new members. Many management committees find it helps members to be given information about the organisation and their role, both before they take on the job and when they've started, to help them become fully involved.

### INDUCTION PACK OR TRUSTEE HANDBOOK

All new committee members should be given a trustee handbook or induction pack. You should think about the format this will take and make sure it is practical and user friendly. A ring binder works well as individual pieces of information can be easily updated without having to re-do the whole pack. This pack should be reviewed regularly to make sure documents are up to date and you should think about who will do this job and how often.

An induction pack could contain some or all of the following documents:

- governing document – constitution or memorandum and articles of association
- a mission and vision statement
- background to the organisation, including when and why it was set up and key dates in its history
- structure of the organisation – management committee, sub committees, working groups, staff and volunteers
- terms of reference for management committee, sub committees and working groups
- minutes of previous committee meetings and annual general meetings
- dates of next meetings, preferably until next AGM
- roles and responsibilities of committee members, including Charity Commission booklet CC3: The essential trustee: what you need to know
- task description for chair, secretary, treasurer and committee members
- list of other committee members, including their profiles and contact details

- expectations of committee members, such as attending meetings, apologies, preparing for meetings, participating in meetings, how long meeting last, how to get something on the agenda, terms of appointment
- expectations of the organisation, such as training, supporting, providing information before meetings and expenses
- code of conduct, including trustee declaration
- annual accounts and reports for past three years
- up to date financial information
- business or strategic plans
- brief description of the roles of staff and volunteers
- newsletters and publicity
- reports, policies and procedures

### INDUCTION MEETING

This should take place before the first committee meeting. It will give the new trustee a chance to meet the chair and one or two other trustees. If the organisation has any staff, it will be useful for the new trustee to meet the chief executive or project coordinator at this stage too.

This meeting will provide an opportunity to go through the main points in the trustee handbook and for the new trustee to ask any questions.

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### The induction meeting may cover:

- the main aims of the organisation and its strategic plans
- the activities or services provided by the organisation
- funding
- issues or challenges facing the organisation
- future direction
- how the committee is involved in running the organisation and developing its strategic direction
- how tasks are split between committee members
- monitoring the quality of the organisation's work
- managing staff and volunteers
- involving users in running the organisation
- sub committees and working groups – how and why they are formed, who is selected to sit on them and how they report back
- It is also a good time to show the new trustee around your base and introduce them to staff and volunteers.

### FIRST COMMITTEE MEETING

At the first meeting of a new committee member, the chair should welcome the person and invite them to:

- ✓ introduce themselves
- ✓ say what their previous involvement with the organisation has been
- ✓ say what skills and experience they bring to the organisation
- ✓ say why they decided to join the committee

Existing members of the committee should introduce themselves to the new person and describe briefly their involvement with the organisation.

### REVIEW MEETING

A review meeting should be planned for shortly after the new trustee starts. It will allow the new trustee to feedback with their first impressions and to ask more questions. The meeting could:

clarify the organisation's structure or activities

- identify the new trustee's support needs including training or mentoring support from another committee member
- identify the new trustee's specific skills or interests that they could contribute to the organisation using a skills assessment
- reinforce the commitment and responsibilities involved
- ensure the new trustee knows the key facts about the organisation such as when it was set up, its key activities, number of staff and volunteers

### RELATED DOCUMENTS

- 2.1 Being a charity trustee
- 2.2 What do trustees do
- 2.3 Roles of a committee member
- 2.4 Roles of a Chairperson
- 2.5 Roles of a Secretary
- 2.6 Roles of a Treasurer
- 2.7 Recruiting new trustees
- 2.8 Inducting a new trustee
- 2.9 Patrons, presidents and trustees

### TRAINING

VODA runs a range of training for committees and committee members through its regular training programme - contact us for more information or visit [www.voda.org.uk/training](http://www.voda.org.uk/training)

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