



30 tips for finding and recruiting the best new trustees

As well as the tips below, members of Northumberland Trustees' Network will also find lots of useful resources in the online Resource Library. It is free for trustees of all organisations that are members of Northumberland CVA to become members of the network, as it is for trustees of groups based in Northumberland that have a turnover of less than £10,000. For those with a higher turnover, it costs less than £1 per week for your organisation to join.

We've arranged our collection of thirty tips into the five distinct stages of trustee recruitment: prepare, promote, recruit, induct, and review.

Prepare

1: Plan every detail: You're embarking on a process that will have a far-reaching impact on your organisation so it's vital to ensure you have effective planning in place that lays out your timetable for recruitment, identifies and prepares the resources you need to have at hand, who will be involved in the process and what budget you have available to support the process. You'll need to include the closing date for applications and the date set for interviews. Recruiting a new trustee can take several weeks so it's important you allow enough time and resources to ensure you do it in a professional manner.

2: Get the whole board involved: There is a lot of work involved in recruiting trustees and it is legally the responsibility of the trustees to do so. Your new trustee/s will become a member of your existing team and so, even if they're not all going to be directly involved in the selection, the whole board needs to be engaged with the process of recruiting new members. Keep in mind the direction of the organisation, the challenges it is facing and its plans for the future when discussing the kind of expertise you want to bring on board.

3: Be clear about the decision making process: Your governing document will usually dictate how trustees should be selected. Whether your board delegates responsibility for organising the process to a person or a sub-committee, the Chair must have oversight of the process even if other people are doing the work. If it is a Chair you are recruiting, you might consider getting an external person to lead; the Chair or CEO of a partner organisation, for example.

4: Conduct a skills audit: You need to know or remind yourself what competencies, knowledge and experience you already have on your board and a great way to do this is to carry out a skills audit. Think carefully about how your internal and external environment has changed and what skills you now need in order to move forward that you may not have considered so important before. Identify the gaps and use them to develop a clear vision of what your ideal new trustee will be like and what you expect from them. This will be your brief recruitment. Reach volunteering has a page dedicated to [how to carry out a skills audit](#).

5: Consider the diversity of your current board: Does your current board broadly reflect the demographics or geographical spread of your service users or community stakeholders? Is it representative of the community, users and the members your organisation serves? A strong board needs to have an understanding of the needs and wishes of **all** the groups of people that form it, support it and benefit from it; it needs a mix of backgrounds, approaches and perspectives to give a balanced approach to the decisions it will need to make. You can achieve greater diversity by reaching out into communities that are not presently represented, for example by advertising and by making specific efforts to assist people who might otherwise have difficulties in attending board meetings.

6: Agree who you are looking for: In light of your skills audit and discussions around diversity, your board needs to make a decision on what kinds of skills, experience and background are essential, and what are desirable in candidates. This may sound like an obvious thing to do but it is surprisingly common for boards to gloss over this decision only to find out that there is disagreement later – often at the appointment stage. If you agree from the outset about what skills, qualities and experience you are looking for, you are also much more likely to attract candidates who have the right qualities.

7: Write a clear role description: It's vital that your role description not only clearly outlines the expertise you're looking for, the general roles and responsibilities of being a trustee and the location and times of meetings, but also what it means to become a part of your particular organisation. Highlight the most interesting aspects of the role and outline the challenges faced by the organisation as well as its future prospects to breathe life into the role and give a sense of what issues the new trustee will be engaging with in real terms. And it's a great idea to also include a sense of what the impact of the role will be on the organisation and what benefits the new trustee can expect to receive by joining the board.

8: Be clear about the different ways that you can bring new people on board: Many governing documents have provision for trustees to be "co-opted" or added to the trustee board in between formal recruitment processes. This is useful if you temporarily want to bring a trustee on board with expertise, for instance during a staff re-organisation, rather than make a permanent appointment. Some membership organisations formally elect their trustees at the Annual General Meeting (AGM) by a vote of the membership.

9: Prepare a detailed information pack for candidates: Your pack should include: a summary of the role description that covers the duties of a charity trustee and the specific skills and experience you're looking for, an outline of the organisation and its priorities for the next 2-5 years, and clear details on how to apply for the role and the appointments process being used. It should also include links to your memorandum and articles of association, the financial accounts, biographies of your trustees and the governance structure, including sub committees and other useful information such as strategic plans.

Promote

10: Write a punchy advertisement: This is your opportunity to 'sell' your trustee vacancy to potential candidates. To stand out from the crowd, it needs to make a compelling proposition for why candidates should want to apply. You may be passionate about your cause but it can be difficult to communicate this enthusiasm in a couple of paragraphs that also need to cover, as a minimum, the trustee role title, location, time commitments, overall responsibility, key areas of ownership, length of term in office, and the minimum qualifications/experience you need. Surveys reveal that the three main reasons people become trustees are to 'give something back', to gain new skills for

professional development, and because they are committed to a charity's cause, so think carefully about how your charity can offer these to the successful candidate and detail them in your advertisement.

11: Think about the timing of your recruitment: It may be possible to take advantage of a time when volunteering is already in the news such as Volunteers Week (June) or Trustees Week (November), or during a related awareness event, such as International Women's Day, Carers Week or Movember, to boost your publicity. If you do this, be sure to use the hashtag in any social media posts relating to the event e.g. #VolunteersWeek to boost views of your post.

12: Social Media: Make full use of whatever social media platforms you use already to recruit volunteers, for instance Facebook, Twitter and/or LinkedIn. Share any posts with other relevant community groups in the area or with online discussion forums and blogs based around relevant topics or interest areas.

13: Consider social media sponsored advertising: If you have a budget to invest in recruiting for a specific skill you are looking for then you could place advertising that is specifically targeted at professionals with specialist skills in a specific location.

14: Look at specialist association websites or e-newsletters: This is useful if you are recruiting for a trustee who has a specialist skill. Try the Institute of Chartered Accountants in England & Wales or the Chartered Institute of Marketing (CIM) for example. These can offer invaluable lists of local groups and networks you could approach.

15: Leaflets, posters and adverts: If you want to reach out into specific communities to recruit, try distributing information in locations you think will reach particular groups. Options include local and free newspapers (through adverts or a weekly column); places of worship (e.g. mosques, churches, temples, synagogues); meeting/leisure places, parks, clubs, cafes, pubs; sports/leisure centres and fitness groups; health centres, or community radio stations

16: Local websites/e-bulletins: Town and parish councils usually have a community site or may send out regular e-bulletins you could use to place an advert or recruitment appeal. Housing associations or community groups may also be willing to help out. Many local councillors also send out an e-newsletter and can be asked to include a link to your website.

17: Use your current networks: Tap into your current networks and ask the rest of the board to do the same. Make sure everyone knows there is a trustee vacancy available. But beware: your existing networks can often result in recruiting in the board's own image so if possible, extend the search beyond this.

18: Widen the search: Contact the HR department of local businesses and see if you could post something on their intranet or in a staff newsletter. Local authorities and large organisations may have someone who offers support to those approaching retirement who may be looking for a new role and so it may pay you to make contact.

19: Use free sector resources: There are resources available for publicising trustee roles such as [NCVO's Trustee Bank](#) or [Step on Board](#) programme (for NCVO members only), [CharityJob](#) (you will need to create a recruiter account), [Do-it](#) - a national volunteering database, or the [Community Foundation Tyne & Wear and Northumberland's TrusteeMatch](#), which lists individuals from business backgrounds keen to share their expertise and develop their own learning and experience further.

20: Use a specialist recruitment firm

If you have the budget available for it, consider using a professional recruitment firm with a track record of recruiting trustees. They will have a database of executives seeking trustee roles and be able to match candidates to your exact requirements. However, many of these firms are based in the south of the UK and their lists tend to reflect that.

Recruit

21: Communicate, communicate, communicate: It's really important to ensure that, when you have received applications you make prompt contact. Taking the time to thank individuals for their application and to set out the time-frame they can expect for the process reinforces the professional approach of your organisation and works wonders in retaining a candidate's interest up until the point of interview. Don't just assume that an applicant will remain interested indefinitely, particularly if there is a significant gap between receiving the application and interview.

22: Create a shortlist: Your process for shortlisting should be structured (even if this is only in an informal way) and it's good to get the board as a whole involved in reviewing the applications. CVs and covering letters cannot always give a definitive endorsement of either a person's skills or personality and so it's also a good idea to have an informal chat with potential candidates to discuss their viability for the role before you take their application further.

23: Interview the candidates: Interviews should be evidence-based to test the candidates' motivation as well as their skills and experience. You should take the time to draw up questions that uniquely relate to the requirements of your particular organisation as well as of the role itself. Don't be afraid to ask about motivation as well as skills and experience to establish their fit to your particular needs. Remember that this is a two-way street and invite interviewee to ask searching questions too so they can fully explore whether they want to join your board. Having such an open approach will elicit real answers to real questions and allow the candidate's personality to shine through too, which allows you to gauge whether someone is the right fit for the role. Make sure you always take verbal references at the interview stage too.

24: Always let candidates know ASAP: A letter should go out in the name of the Chair to both successful and unsuccessful candidates telling them what decision has been made, giving brief reasons (with reference to the interview notes) and thanking them for their interest in the charity.

25: Complete the appointment: Always follow up on references of candidates – it's not enough to rely on verbal references or assume they are a good appointment on the basis of a strong interview – and if your charity works with children or vulnerable adults you need to ensure you carry out a Disclosure and Barring Service (DBS) check. You should also check that the candidate is not disqualified from being a trustee – read the guidance on the [Charity Commission website](#). Then confirm the formal appointment at the appropriate board meeting and register with the Charity Commission, if appropriate.

26: Offer other roles to unsuccessful candidates: If you have unsuccessful candidates who are interested in supporting your organisation and who you feel have skills and attributes that would be of benefit – consider offering them an alternative role. Could they be an ambassador or sit on an advisory committee? Do they have specific skills that would make them a good volunteer? In this way you may be able to develop them into a future trustee.

Induct

27: Give your new trustee a full induction: Poor induction is one of the most cited reasons for individuals stepping down prematurely, so once you've found your ideal candidate, ensure they receive a good induction to help them settle in quickly. Make sure they have clarity about your mission, plans and objectives, and give them copies of the minutes of the last few meetings, relevant policy documents, and importantly, the governing document for the organisation. Introduce them to the other trustees – you may even consider offering the new trustee an existing trustee as a 'buddy' who can mentor them through the first few months. Give opportunities to talk with staff to find out what they do, and it will help if you can include in the induction a document that explains the organisational structure with thumbnail photos and a short bio for each trustee and staff member. Don't forget to introduce your new trustee to key partners, supporters and other stakeholders.

28: Translate: It can be quite a culture shock for many new trustees straight from the private sector. Most will not understand the nuances and language of the voluntary and community sector so do all in your power to avoid jargon. Remember too that decision-making in the VCS often requires a lot of consensus-building and this can be a very new experience for those in the private sector who are used to a faster pace in reaching decisions. A lot of patience may be required from both sides.

29: Identify training needs: Each new trustee will have different support and development needs and will want to meet those needs in different ways. Support, development and training can involve: attending workshops, conferences or training courses on different aspects of a trustees' role; receiving briefings and update sessions at board meetings; reading books and online guidance; taking an online learning course; meeting trustees from other charities, or arranging for new trustees to be mentored by existing trustees. Many organisations combine trustee induction with an annual away-day so that training serves as a refresher for the other trustees as well.

Review

30: Evaluate your recruitment process: Taking time to review what you have done and how it could be improved is essential to any process of learning, and trustee recruitment is no different. It will help you identify what worked well, and what could be improved. It can help you be more efficient and effective next time. As a minimum, ask all those directly involved in the recruitment process for their feedback on what worked well and what didn't and for their suggestions for improvements for the next time, but you may prefer to also pinpoint a particular part of the process and review this in more depth. For instance, have you filled the skills gaps you identified or did certain promotion methods work better than others? Most importantly, ask the new trustee for their perspective on the process. How are they settling into their role after 3-6 months? Do they have any issues? Is this is this right role for them? Did the induction process meet their needs? This information should also help inform your process when you next recruit a trustee.

Don't forget, for links to lots more resources on recruiting trustees, make sure your organisation is a member of Northumberland Trustees' Network and Northumberland CVA.

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