

# HOW TO RECRUIT TRUSTEES FOR YOUR CHARITY

## A PRACTICAL GUIDE







This guidance sets out what we've learnt about trustee recruitment and the key components to running a successful campaign.

The first version of this guide, published in March 2019, was based on the experience and learning of 30 charities that took part in a pilot programme, Trustee Recruitment Pathways. Updated in September 2023, it includes real-life case studies, tips, examples and quotes from the original charities and others Getting on Board has worked with since then in its Transform programme and through its wider work.

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# FOREWORD



**Trustees are often at the very heart of charities and the amazing and important work they do.**

It is so important that charities are able to recruit trustees with the right mix of skills and experience. This will enable them to better navigate change, tackle difficult decisions, seize new opportunities and make more informed choices – all of which are key to good governance.

Sometimes, it can seem difficult to know where to start when recruiting a new trustee. Yet taking the time to recruit someone with the right abilities and background, to fulfil your charity's needs, will prove worthwhile. This practical guide will lead you through the process step by step – from identifying skills gaps, right through to advertising and induction.

**Holly Riley, Head of Strategic Policy**  
Charity Commission for England and Wales

# A NOTE FROM THE SPONSOR



**Rathbones is delighted to have sponsored this guide to help charities recruit the best trustees for their organisation.**

Importantly, the best practice contained within is based not just on theory but on what has been comprehensively proven to work on the ground.

The case for good governance in charities led by trustees who are well qualified and have a proper understanding of their role has never been clearer. Most of us will be aware of the reputation-shredding stories about certain charities over the past few years. In addition, disruptive change is happening faster than ever across the political, economic, legal, social and technological spectrum. It is therefore imperative for every charity to have the best trustees on board.

Governance is a subject close to our hearts at Rathbones. We are a constituent company in the FTSE4Good Index that only includes companies demonstrating strong environmental, social and governance credentials. As a signatory to the United Nations-backed Principles for Responsible Investment, we ensure corporate governance factors are considered when deciding whether we invest in a company on behalf of our clients. Our commitment also extends to supporting charities to understand and manage their own governance responsibilities. As well as supporting great publications such as this, we have had around 3,000 charity trustees attend our trustee education programme over the past 10 years, our aim being to help them perform their roles more effectively.

I am sure that How to Recruit Trustees for Your Charity: A Practical Guide will be invaluable to those operating in the charity sector, and we are proud to be involved.

**Andrew Pitt, Head of Charities**  
Rathbones Investment Management  
[rathbones.com](http://rathbones.com)



# A NOTE FROM THE AUTHOR



**I love being a charity trustee. There are some days when it's difficult because tough decisions need to be made or I have to manage the role alongside other competing demands on my time but it is incredibly rewarding and fulfilling.**

I feel genuinely privileged to have a special insight into the amazing work the charity does, access to great leaders I can learn from, and the humbling experience of realising that my small contribution has added value and helped the organisation to function just that little bit better, producing even greater impact for our beneficiaries.

And because I was appointed (in part) because of the professional skills I have, I'm challenged to think how I can use those skills for the charity and have an opportunity to develop professionally in a non-work context.

We've seen a significant shift in recent years in the number of charities seeking to open their boardrooms to a more diverse group of trustees, which is fantastic to see. This is evidenced by the number of charities joining our webinars and other training. Trusteeship shouldn't be the preserve of the white, middle-class 'great and the good'. Getting on Board still encourages people from these demographics to become trustees as well as others from less 'traditional' trustee backgrounds. This paves the way for a dynamic and fulfilling mutual learning environment for all trustees – ultimately for the benefit of their charities. Anecdotally, the number of younger trustees, Black and Asian trustees, and trustees from a broader range of social backgrounds and professions is growing.

**"We've seen a significant shift in recent years in the number of charities seeking to open their boardrooms to a more diverse group of trustees, which is fantastic to see."**

But we also see there are many charities that have a desire to open up their trustee recruitment but lack the confidence or know-how to do this well. We've also heard from potential and new trustees how their experience of trusteeship (or the recruitment process) has been far from ideal and, for some, very damaging: who have recognised they've been a 'token hire', sidelined in the boardroom, and undervalued for the breadth of experience, skills and insight they bring.

Also acknowledging how our own learning has developed, we've refreshed this key guide. Now forming part of a wider collection (which we're super-proud of!), it continues to guide trustees through the recruitment process, whether for the first time – for their charity or them personally – or to help charities further along their journey to refine their practices and look for new ideas to try.

Our sister guides [How to Diversify your Charity's Board, From Here to Diversity: A Practical Guide to Recruiting Black and Asian Trustees](#) (in partnership with Action for Trustee Racial Diversity) and [How to Become a Charity Trustee](#) build on this foundation. Challenging, inspiring, practical, and all-round great reads, with even more expert insight (including from those with lived expertise), they provide a valuable toolkit to help boards reflect on how they really appear to potential trustees, some common mistakes they may have unintentionally made, and how they cannot just increase the diversity of their boards, but enhance every trustee's ability to bring their best – as individuals and as a collective.

**Lynn Cadman has nearly 20 years' experience in the charity sector: in regulation, charity law and governance. She previously worked at the Charity Commission, and is a trainer for Getting on Board, a former trustee of a local charity in Haringey in north London, and a current trustee of BMS World Mission.**

# INTRODUCTION

## Trustees are some of the most important people in a charity.

They have the potential to enable a charity to thrive or to bring its operations grinding to a halt, and a charity's service users are dependent on its trustees to make good decisions and lead well.

Charities need a wide range of skills from their trustees, to understand and address the many challenges charities can face, and navigate the changing context in which they operate. They need trustee boards that can challenge one another and the status quo, which bring different experiences, knowledge and ideas, but are able to work constructively and enthusiastically as a team.

That is why board diversity is so important – because diversity brings together the rich mix of qualities that make a healthy and effective board.



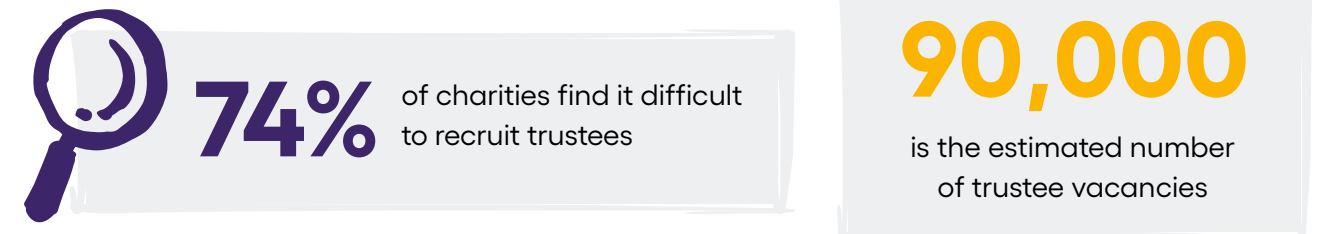
The Felix Project charity

## Why do charities find it so hard to recruit trustees?

Trusteeship is an incredibly valuable experience



## So it's surprising that



## Until you realise that



**68%** of charities don't interview prospective trustees

## The result?





# WHY OPENLY RECRUIT TRUSTEES?

**Your trustees play an integral leadership role in your charity. Your service users deserve leaders who will excel at what they do.**

Recruitment for paid roles enables you to select the best candidate, having built a relationship and understanding of how you can work together for the good of the charity's service users. Good trustee recruitment works in the same way. A new trustee might shake things up a bit. But it can be a far greater risk if the board table is filled by a group who all think the same way: they're less likely to be alert to the range of risks and opportunities facing the charity, to spark creative thinking in one another, and to bring the breadth of knowledge that a charity may need from its board.

To find the mix of people with the skills and other qualities you need to lead your charity effectively, it's time to look beyond your own front door and extend your search much wider. Being intentional about when and how to recruit can make a really positive difference to what your board looks like.

There can be a fear of bringing in 'outsiders' onto your charity's board. What if they don't understand the charity or hijack how you do things? These are understandable but often misplaced concerns. However you recruit, your existing trustees will 'own' the process – open trustee recruitment does not change that.

It's easy to make a business case for open trustee recruitment:

- Research suggests that more diverse boards (in the broadest sense) – in any sector – are able to make better, more rounded decisions and think more creatively.
- Open recruitment enables you to reach a far wider pool of potential trustees and to target the specific skills, knowledge, experience and other qualities that your charity needs at a given point in time, including those gained from lived experience of your charity's cause.
- There are a plethora of free and low-cost trustee recruitment tools available, so the main resource required is time – a more effective board is a great return on this investment.
- Investing in the future leadership of your charity can save you time and money in the long run, and enable your charity to do even more to support the people it's set up to help.





# BEFORE YOU START

**A good trustee recruitment campaign doesn't have to cost thousands of pounds or be really complicated. But it does need due consideration.**

Planning your recruitment campaign will take some time and effort – especially if it's the first time you're trying out open recruitment.

But trustees are critical leadership roles within your organisation. It's worth investing the time in getting the right people.

Take time at the outset to plan what the recruitment process will look like for your charity: who will be involved in writing and signing off the advert and/or campaign, or interviewing candidates? What are the key or specific dates within your campaign, including for notice and meeting dates for the formal appointment or election of candidates?

## Use the checklist below.

Have a look at templates and examples of [recruitment campaign plans](#).

Before you launch your campaign, take an objective look at how you appear to the outside world. For example, is your entry on the Register of Charities up to date and have your accounts been filed on time? Is it clear from your website and other materials what your charity actually does and why it exists? If there are things that might deter potential trustees, address these now if you can or be prepared for questions that might crop up.

As you look objectively at your charity you can also gauge how inclusive you are as an organisation or how that might appear from an outside perspective.

- ✓ What images and language do you use?
- ✓ How welcoming and accessible does your charity seem to someone from the outside?
- ✓ By considering accessibility and inclusion from the outset, you increase your chances of attracting more diverse talent.
- ✓ Think about not just how you come across to the public, but about how you hold meetings and run the charity. Are you inadvertently creating unnecessary barriers or unconsciously favouring a particular image or group? This is a good time to identify and address this.

Keep the number of steps in the process as small as possible – and make them proportionate to your situation.

# THE 8 STAGES TO RECRUIT TRUSTEES

**Trustee recruitment isn't 'one size fits all'. Read on to find out what might work for your charity.**

We've identified the following stages in a good trustee recruitment campaign.

**Click on a circle to find out more.**







01

## WORKING OUT WHO YOU NEED ON YOUR BOARD

## A good trustee recruitment campaign doesn't just bring new people to the board – it brings the right people for what your charity needs.

There is no such thing as the 'ideal board': the mix of people your charity needs will be specific to your organisation and will change over time. It can be tempting to recruit on a 'like for like' basis, particularly if you are recruiting because a trustee is standing down from the board. But you can't assume that the skills and experience they have are the most critical qualities you need from a new trustee.

Similarly, there may be advantages to recruiting more than one trustee to cover a wider skills base and/or enable you to be more flexible about the amount of board experience new trustees need to have. There is also some diplomacy needed with existing trustees: evaluating what skills and diversity of thought you will need from trustees in future isn't to suggest that remaining trustees are deficient in some way; an assessment of skills should be presented as a positive opportunity to reassess where you are, so it isn't perceived as criticism. Rather, it's about making sure that your board as a whole continues to be equipped to provide sound leadership.

Targeting the specific skills and other qualities you need from new trustees to build a diverse board is one of the key advantages of open trustee recruitment.

Many boards are deterred from carrying out a formal skills audit because it seems like hard work and/or they don't know where to start – or they just haven't thought about it. However, this is a really valuable and vital part of any recruitment exercise.

Charities are increasingly using skills, knowledge and diversity audits to broaden their focus from purely a work-based skills context, to considering how other life experience (including that linked to protected characteristics) and personal qualities can enhance decision-making.

There are many board audit templates available to help. Often these list fairly generic skills and experience that charities need, so while they provide a useful basis, make sure you personalise any template to your charity.

**“An audit of trustees’ skills helps to identify gaps to focus recruitment in a way that saves time and ensures the board remains forward-thinking.”**

Erin Northey  
trustee

# HOW TO WORK OUT YOUR TRUSTEE RECRUITMENT NEEDS

**An alternative, or complementary, format to a formal board audit is a short exercise – perhaps in a board meeting or working group – to help you identify what you need in new trustees.**

### As a board, ask yourselves:

- What skills, experience and other qualities do you have around the board table (both professional and personal)?
- What challenges and opportunities is your charity likely to face in the next five years? What skills do you need to navigate these and why?
- What's the gap between what you have now, and what you need to meet your organisation's ambitions and face its challenges? Will this change because of existing trustees standing down?
- Moving beyond the skills your board is looking for, what diversity of experience, economic, social and geographic background, personality type or ways of thinking and protected characteristics would enhance your board? In particular, does your board reflect your community of service users or do you need to recruit trustees with lived experience of the issues you are seeking to tackle?
- Do the specific skills you need have to be held by a board member? Or could you call on advisory groups or sub-committee members, other volunteers, staff or external advisers? If you need a skill for a limited time, you could co-opt a trustee to the board for a shorter period or appoint individuals to a time-specific 'task and finish' group.



Example of a charity’s strategic needs informing trustee recruitment requirements:

Challenges/opportunities the charity faces	Skills and experience needed
Outgrowing current premises – but has potential to extend	Individual with experience in building, planning and/or relevant consultancy to help develop plans to extend the charity’s building or source alternative premises
Competition for funding and reliance on contracts	Entrepreneurial, or has experience generating new sources of income to help protect or diversify income streams
Developing partnerships to reach a broader set of service users, to tackle the fact that those most affected in the charity’s field are under-represented in its client base	Marketing or PR skills to help raise the charity’s profile among potential partners and clients, and/or understanding and belonging to a particular community

Make a note of the particular types of skills and other qualities that you’re looking for from new trustees, as well as the reasons why. It can be difficult to articulate the particular type of people you want to attract, especially if they work in an industry you’re not familiar with. Rather than trying to pin these skills to a job title, articulating why you need a particular skill set will help you think more broadly about who could be a good fit for you and also enable potential candidates to self-identify.

For example:

“We need someone with fundraising skills or experience in generating income because we need to find new sources of revenue to build our sustainability, and provide strategic direction to our current fundraising team.”

# UNDERTAKING A BOARD AUDIT

You can use one of the off-the-shelf templates available to undertake a skills and experience audit of your current trustees, but remember to edit it, so it’s relevant to your charity.

For example, an understanding of NHS commissioning or Care Quality Commission regulations, or lived experience of a particular medical condition, might be relevant to one organisation but not to another.

You can then work out what you are missing from your board based on your organisation’s current strategy, set against who you already have on the board.



The Getting on Board Team



# DIVERSITY OF YOUR BOARD

**As part of this process, it is worth thinking explicitly about diversity – in terms of both protected characteristics (e.g. race, gender, disability, sexual orientation, religion, etc.) and diversity of thought and experience.**

This is about taking stock of how diverse you are as a group of trustees and whether there are any groups of people who are under-represented; and whether your board as a whole reflects the people you wish to serve.

The intention is not to target an individual simply because of their protected characteristic(s) – nobody likes to be a token hire. But rather to improve the diversity of your board – and therefore its effectiveness and quality – by recruiting trustees with the skill sets you're looking for, who also think in different ways, and who bring different perspectives, life experiences or other qualities that would add value to your board discussions.

Different personality types or personal qualities may also be relevant. For example, do you have a mix of trustees who have the ability to look at the big picture, as well as those with good attention to detail? Those who think carefully about taking care of staff and volunteers, alongside those who are driven to get the job done?

Getting on Board's sister guide [How to Diversify Your Charity's Board](#) has lots of useful information on why board diversity is fundamental to a charity's governance, and how to achieve and maintain a balanced and inclusive board.

Board diversity audits should be undertaken anonymously and results analysed in aggregate, so individuals cannot be identified. Trustees should be given the opportunity to say if they do not wish to answer. Reach Volunteering has an excellent [diversity audit template](#).





# PINNING DOWN YOUR PERSON SPECIFICATION

**The list of relevant lived experience, skills, knowledge and other personal qualities you've identified as 'missing' from your board will help you put together a 'person specification' and give you a basis against which to assess potential candidates.**

You might split your list into different categories, such as understanding of the charity's cause, professional or sector knowledge, training, networks and personal qualities.

List your criteria in order of priority to highlight what are 'essential' and what are 'nice to have' (or 'desirable'). If your board is full of visionaries, but doesn't include anyone who is good at putting dreams into action, finding someone who can do this might be a greater priority than choosing someone with knowledge from a specific profession. If your list of essential criteria seems overwhelming or unrealistic, consider whether you can relegate anything to desirable criteria.

Think about whether the depth or nature of someone's experience is relevant.

A community garden that's expanding into a derelict site might benefit from a trustee with professional gardening knowledge. But this could include a landscape gardener who's on a career break, a trainee gardener or a college lecturer in horticulture.

Do you need a senior marketing professional, or would a marketing student or compelling storyteller from a volunteer-led campaign bring the wisdom you need? Expressly saying that you will consider training or knowledge gained from education or volunteering, as well as professional or work-based experience, can open opportunities up to a wider group of people. In other cases, 'on the job' experience or access to an individual's professional network might be critical to what the charity needs, so think about how to present this.

For lived experience, does it matter how recent this is? It might be particularly important if there have been significant changes within the charity's sector or which have affected its service users in recent years.

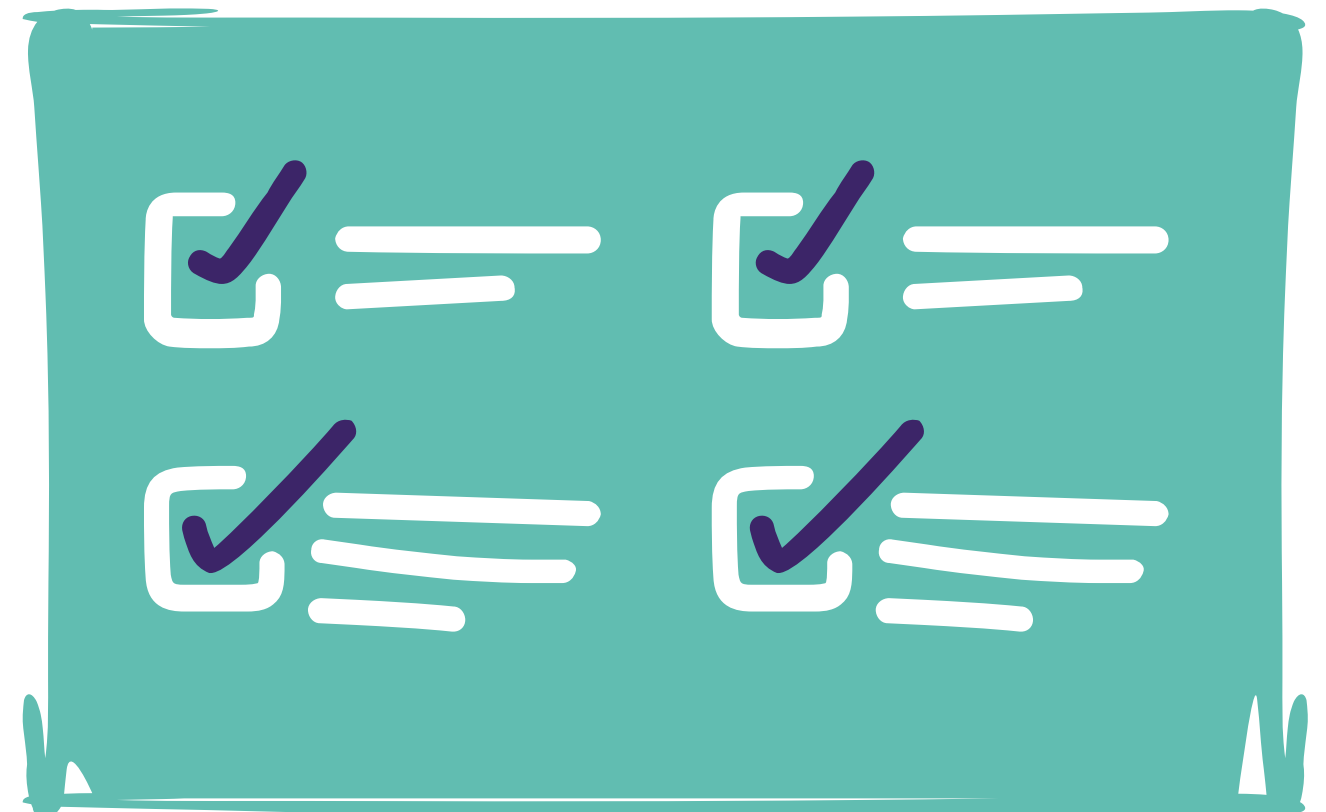
A 19-year-old with a younger sibling might bring more meaningful understanding to a charity dealing with cyber-bullying than someone who was a youth volunteer with the Scouts 25 years ago.

For each of the criteria in your person specification, be confident you can justify why they have been included – and why they are essential or desirable. If you can't, then take them out. Also keep a note of why you've included them so you can refer to this in your advert or recruitment pack.

Make clear if applicants need to meet criteria across multiple categories or a minimum number of essential criteria. If you've got the option of recruiting several new trustees, you can assess whether they meet your essential criteria collectively, but not necessarily individually. This could give you flexibility to appoint someone who meets lots of your desirable criteria, but not necessarily the essential stuff (which could be covered off by others).

Remember, there may also be strong candidates who don't obviously meet the specific skill sets you've included in one particular category, such as professional skills, but who might actually complement your organisation really well. Being clear about what you're looking for overall and why will help potential trustees to communicate to you what added value they could bring.

Make a note of particular types of diversity (including neurodiversity, protected characteristics or relevant parts of your charity's community) that are under-represented on your board. This can help you decide on where to target your advertising later or the specific wording to include in your advert to reach those you want to recruit.



# TIME COMMITMENT

## Another key factor is to assess the time commitment that is required of your trustees.

Trustees will often have tasks to carry out between board meetings, so it's worth asking existing trustees how much time they devote to different aspects of their role on a weekly, monthly or quarterly basis. If you are looking for new trustees to sit on committees or working groups as well as the board, or to volunteer in other ways with the charity, then this also needs to be factored in. Bear in mind that this could reduce the pool of potential candidates – so if it's a 'nice to have' rather than a strict requirement, then either say this or exclude it from the time commitment stated.

Similarly, there may be an agreed understanding that not all trustees need to commit the same amount of time. Including a minimum time commitment or a range can be helpful – as well as noting that some trustees might choose to do more, either on an ongoing basis or when they can.

As you look back at your list of organisational challenges and opportunities, think about whether any of these are likely to demand more or less time from trustees in future, so you can be upfront with potential candidates. You may also need to shift your current practices and expectations of what commitment looks like.

For example, you might always have met during the day in person. Meeting on Zoom, at a different time of day or at a different venue might make trusteeship more accessible for a disabled trustee or someone with caring responsibilities who may not otherwise be able to apply. You might hold board meetings in different places throughout the year, to balance out the amount of travel for each trustee, or choose to meet in an area that's closest to a trustee with additional needs, to ease the logistics of getting there and maximise the physical or mental energy they have to give in the meeting. You could also allow others to attend the board to support the individual trustee (such as a carer), and/or adapt your board papers or meeting practices.



# 02

## WHAT TO INCLUDE IN YOUR ADVERT



**Your advert is the window to your charity. It needs to appeal to the people you want to attract, both visually and in terms of content.**

An advert is a piece of persuasive writing. It needs to be clear about what you are 'selling', honest and appeal to the type of person you want to attract. Why should someone become a trustee – especially of your charity? A useful starting point can be to critique trustee adverts that other charities have produced. What stands out and works well? Is there anything missing or that would deter you from being a trustee of that charity?

Igniting a passion for your charity's cause is likely to appeal more than a simple description of the trustee role itself. How you describe your organisation and why you exist is therefore critical. Ideally, your advert should be fairly brief. The aim is to grab someone's attention and convince them to find out more. If you try to include everything in your advert, it may lose its impact, so it's better to keep it concise and simple, and clearly direct potential candidates to sources of further information.

Writing an advert and deciding where to advertise is a bit 'chicken and egg'. Where you advertise might place constraints on you. For example, most trustee-finder websites will have a standard format, with limited scope to alter the layout or add images. But that shouldn't hinder you from being creative: developing an eye-catching or verbally punchy advert might help you to think more broadly about where you could advertise.



Photography by Chona Kasinger for Disabled and Here

# TRUSTEE TRUTHS



## A fair application process

I became a trustee in 2018 when I was just taking on my first marketing manager role.

The chair of the charity advertised on LinkedIn, so I approached them and asked more about the role and whether having a background in marketing could help.

The charity's work involved mentoring for children. I know that mentoring makes a massive difference as I was mentored and grew up in quite a deprived environment.

It was like applying for a job. I was interviewed by the CEO plus one other trustee, and we explored what skills I would bring and I was able to get a feel for the role. We talked about how you approach decision-making and whether you tune into your instinct or not, and about past experience and what I could bring to the role.

We still use this process now when we recruit trustees, though we refine it every time. The process makes it fair. It's right, given the serious nature of the role and the legal operation of the charity.

It gives both you and the existing board the time to make the right decision on whether to join or not.



**Sian Conway-Wood**  
Trustee at Mentor Link



# TOP TIPS FOR ADVERTISING FOR TRUSTEES

## Clear as a bell

Don't make the reader work too hard. Think about the information that will help them make a decision to apply, and give it to them in an easy, accessible way.

## Make it engaging

You want to draw people's eyes away from everything else, so they settle on your advert. A straightforward, conversational style tends to work best, along with an attention-grabbing headline.

## What's your angle?

What is the ultimate purpose or goal of your charity? How will the new trustee help you achieve that goal? Don't make readers guess – tell them!

## Who's your audience?

Are you hoping to attract more young applicants? People with direct experience of the issues your organisation addresses? Someone with specific technical skills? If so, you need to write your advert with that audience in mind. Think about what information will be most important to them and what tone of voice will be most effective.

## Spread the word

Your collective network – and their networks – are a valuable resource for finding trustees. Your Thursday exercise class, other parents at the school gates, the local church or village hall, or an organisation like Action for Trustee Racial Diversity, can all give you connections to people with the personal or professional qualities you're looking for. It's amazing how wide your network spreads once you start to ask for help in getting the word out. Don't be tempted to bypass the recruitment process, though: every potential trustee should be asked to apply. This helps you, and them, work out if they can be useful to your organisation. And if someone thinks they're too important to apply, what kind of trustee would they make?

# THE SKILLS AND EXPERIENCE YOU'RE LOOKING FOR AND WHY

## A key reason for undertaking an open recruitment campaign is to broaden the diversity of your board, in the broadest sense of the word.

It's therefore vital that you include details of the skills and experience you're looking for – and whether you expect an individual to possess some or all of those skills. You might already have thought about this when preparing your person specification, so it will be straightforward to add to your advert. It may require you to produce different adverts for different types of trustees: the rest of the advert can be the same but the skills and experience section can be tailored with appropriate language and more detailed information. This will help to grab your reader's attention and make the most of the limited space you have.

For example, if you're looking for two individuals with marketing and financial skills, respectively, someone with a marketing background may not be interested in implementing a new finance system (so it's wasted information). But a small business owner, accountant or someone who manages their family's budget might have specific expertise that could help with this.

If you include the reasons why you are looking for those skills, it may enable people to self identify that they would be suitable for the role even, if you haven't explicitly referred to their profession in the advert.

For example, a surveyor, architect, lawyer, builder, project manager, contract manager or service user may all have skills that would benefit the charity if it is developing or moving from its premises. Someone with lived experience and a relevant work background might be even more motivated to apply if they can see that both of these attributes would be useful to and valued by your charity.



Ensure that you're clear about whether candidates need to meet some or all of the criteria – a common trap is that applicants think they need all of the skills listed (which they're unlikely to have) because charities have made the mistake of saying 'and' when they mean 'or'. During your skills and diversity audit, you may also have considered how much experience you are looking for from new trustees.

For example, if you're looking for HR skills, would you consider candidates at an earlier stage in their career or currently studying? Do they need to have specific qualifications or is suitable management experience enough? If so, it can be helpful to include this in your advert, so it's clear you are not only seeking professionals who hold a senior role in their organisation or have a particular qualification.

Don't limit applications to those with board experience, as this narrows the pool of potential candidates. While expecting or even simply desiring board experience might appear reasonable, in reality it directly excludes various groups that are under-represented in trusteeship. If there isn't a compelling reason to include it, then don't (and consider actively encouraging people without previous board experience to apply).



Trust Links charity

# ENCOURAGING APPLICATIONS FROM PEOPLE UNDER-REPRESENTED ON YOUR BOARD

**We're often asked how charities can encourage applications from candidates who are under represented on their boards, or candidates without prior experience, without appearing tokenistic or saying something inappropriate.**

Here are some examples of sample wording to guide you:

**"Previous board or trustee experience is not necessary and we welcome applications from all ages and backgrounds."**

This is a generic example of how to encourage applications from a wide range of people. This small step can be the thing that encourages someone to apply and emphasises that you are open to applicants from different backgrounds.

**"It is not necessary to have previous board committee experience as training will be provided. This position would therefore suit an individual taking their first steps to develop wider board level and governance experience."**

## Sense about Science

This is an example of how you can encourage first-time trustees, while also demonstrating some of the things they would gain from the opportunity.

You can also positively encourage applications from groups who are currently under represented on your board. Here's an example:

**“We particularly welcome applications from [women, people of colour, under-30s, people with lived experience of homelessness] as we want our board to be more representative of our community.”**

You can adapt the wording in brackets to fit the gaps you have identified on your board. This wording doesn't come across as tokenistic – it highlights to potential applicants that you recognise under-representation and are seeking to address it.

There are further examples in Getting on Board's guide [How to Diversify your Charity's Board](#).

You could also test out your advert with some of your service users or people from under-represented groups that you're reaching out to. This needs to be done thoughtfully, so people feel they can be honest with their feedback, but can help sense-check your advert and give you confidence that it comes across as you intended.



# WHAT THE ROLE ENTAILS AND THE TIME COMMITMENT

**“Trustees have overall control of a charity and are responsible for making sure it's doing what it was set up to do. They may be known by other titles, such as: directors; board members; governors; committee members. Whatever they are called, trustees are the people who lead the charity and decide how it is run.”**

Charity Commission for England and Wales

**The role of a trustee may be unfamiliar to individuals with the skills and other qualities that you're looking for, so don't assume that great potential candidates will know what a trustee is.**

The role may also look slightly different from one charity to another. Describe it in a way that makes sense to your target audience and will resonate with the reasons they may want to join your board.

You might also use a different term to 'trustee', such as 'director' or 'member of the management committee'. Just ensure that potential candidates understand the type of role it is. Include the expected time commitment, and frequency and location of board meetings, to help potential candidates decide if they can meet your expectations.

If trustees can participate in meetings via video or conference call (if your governing document permits these) you can include this information. It's preferable to have at least some meetings where everyone is face to face, to help build relationships and a sense of belonging among trustees. 'Hybrid meetings', where some trustees are physically in the same room and others join online, can be much harder to manage. It can be more difficult for those joining online to participate as fully, particularly as it's often more obvious when those in the room have something to say.



Thinking about how you'll manage this (including chairing the meetings) can make existing trustees more aware of how it will feel for new trustees joining the board. As an alternative, trustees might consider all meeting online or all in person at different points in the year.

Similarly, if your board could meet during evenings or weekends this could attract more people in full-time employment or those who have less control over their 'working day' (but bear in mind that those who work shift patterns or evenings might need greater flexibility). Also mention that although the role is voluntary, reasonable out-of-pocket expenses will be reimbursed.



Photography by Lou Jasmine for The Unmistakables

# HOW POTENTIAL CANDIDATES CAN FIND OUT MORE

**Some individuals may apply for the role solely on the basis of your advert.**

But a concise advert is unlikely to provide all potential candidates with the range of information they would like to know.

Your advert can therefore signpost where they can find out more information about the role and the charity. This might be to a recruitment pack that can be downloaded from the charity's website, including in different formats for those with specific needs, or if this is not possible, that they can request a copy from the charity by phone or email.

You may also provide a named contact who can have an initial chat with potential candidates or respond to email queries about the role or application process, although it should be clear this is optional.



**“Your advert can therefore signpost where they can find out more information about the role and the charity.”**



# HOW TO APPLY FOR THE ROLE

## It is crucial that you include in the advert how potential candidates can apply for the role.

It is common practice to invite applications in the form of a CV and cover letter by email and/or post. Alternatively, you might direct them to a trustee-finder website or to complete an application via your own job vacancy portal on your website if you have one. You might also be happy to accept applications in different formats or media, such as a short video of the applicant explaining why they're attracted to the role and what they have to offer.

It is recommended that you include a closing date – it will give potential candidates more impetus to apply and will avoid you missing out on good candidates because they hadn't realised you were working to specific timeframes.

Your recruitment plan should include timeframes for your role to be advertised, although it is recommended that you leave an advert open for a maximum of eight weeks. If necessary, you can extend the application period or re-advertise the role at a later date.

“It is recommended that you include a closing date – it will give potential candidates more impetus to apply and will avoid you missing out on good candidates because they hadn't realised you were working to specific timeframes.”



# TRUSTEE TRUTHS

\*#\*!!

## What trusteeship has brought me

Being a trustee has made me better able to appraise decisions and suggestions for policymaking. I can think from a management level what the different considerations and commitments are, and what the financial implications are of a specific decision. It's made me more reasonable in my expectations, but also more firm. There are things that are possible to do, even when others say they aren't. They just take work.



**Chinelo Nnadi**  
Medical student and trustee at  
Springfield Advice and Law Centre





# ACCESSIBILITY INFORMATION

**There may be specific requirements you want to cater for to reach under-represented groups on your board.**

For example, if you're looking for trustees who are partially sighted, you may want to produce an audio advert or one that is compatible with screen-reader technology.

An advert doesn't just have to be in written format. For example, you could use a video advert instead (or include a link to one) or infographics, which can work particularly well on social media. Putting your advert in a suitable format for your target audience – including those with accessibility needs or who process information in different ways – should be your aim anyway.



# OTHER POINTS TO BEAR IN MIND WHEN PRODUCING YOUR ADVERT

**Avoid jargon and acronyms that you use within your charity as these may not be recognisable to those outside the organisation and could deter potential candidates – unless you want to specifically appeal to those with knowledge of the area in which the charity works.**

If you want to resonate with an industry you're not familiar with, then look to other contacts, staff or advisers in your network who may be able to help to draft some suitable wording.

Your advert needs to resemble who your charity is and what it aspires to be. If a candidate comes to interview and doesn't recognise the organisation they saw portrayed in the advert, it is likely to discourage them from joining your board. The overall style and branding should be consistent with your website and/or other publications the charity produces. Similarly, your advert should underpin your organisation's values. For example, if one of your values is accessibility, ensure board meetings have suitable access for those with mobility issues and are at a time of day that most people can make.

Simplicity is beautiful. You don't need epic graphic design skills to create a fantastic advert. Simple formatting, clear language and a dash of colour or a well-chosen photograph can work wonders.

Not everyone wants to volunteer for solely altruistic reasons. Research commissioned by the Charity Commission for England and Wales<sup>1</sup> found that a personal interest in the aims of a charity is the primary reason for the majority of trustees joining their board. But that isn't always the case. Showing how trusteeship can be good for personal and/or professional development can help to attract ambitious candidates who see trusteeship as a tool to gain new skills or public profile, or to achieve a more well rounded balance in their life. (And that isn't a bad thing!)

1. Research commissioned and published by the Charity Commission: [Taken on Trust – The Awareness and Effectiveness of Charity Trustees in England and Wales](#).

# TRUSTEE TRUTHS

\*#\*!!

## Interest and enthusiasm are winning qualities

I found two trusteeships advertised on the Reach Volunteering website. One is a treasurer position for a housing association and the other one is a board position for a human rights charity focusing on the UK. Applying as a first time trustee I looked for adverts that were not too specific in their ask. There were some adverts on there that were asking for so much: 'and, and, and.'

I would suggest the narrower you pitch your advert, the more you're cutting off people who might apply. When you're recruiting trustees, you've got to remember that people are going to be doing the role voluntarily and are likely to come from a wide range of backgrounds and have a variety of skills. Pitching a role too narrowly may result in excluding or discouraging applications from people who may turn out to be terrific candidates.

What attracted me to my ones was that they were clearly quite flexible about who could apply. The person's enthusiasm and will to get stuck in was more important than what they've done in the past. You might have a candidate who ticks all the boxes in terms of skills but then contributes nothing, whereas a person showing interest and enthusiasm may provide far more in terms of commitment and contribution.



**John Powlton**  
Trustee at a housing association  
and a human rights charity



Charities have produced other examples of adverts.

## The benefits of being a trustee

**96%**

of trustees say they have  
learnt new skills

**22%**

got a promotion  
because of it!

**73%**

say it has boosted  
their confidence

**86%**

say it's a good complement  
to professional and family life

**84%**

said being a trustee  
made them happier

**38%**

had new leadership  
aspirations as a result



03

## DEVELOPING YOUR RECRUITMENT PACK

## A trustee recruitment pack is there to provide more information, so you don't have to cram everything into an advert.

Not every charity will need a recruitment pack.

Don't feel that you should produce one for the sake of it, but do what's appropriate for your context. Even if you're embarking on your first external trustee recruitment campaign, you don't necessarily have to start with a blank page: use the resources already at your disposal. For example:

- Mission and vision statements
- Organisational values
- Strategy document or business plan
- Trustees' annual report and financial accounts
- Role description or trustee code of conduct (if you have them)
- Extracts from funding bids that explain your impact and services

Update or summarise this information, if appropriate. This will help reduce the work involved in your campaign and also help to show 'brand continuity'.

Your advert will provide a summary of what the charity does and what you're looking for in new trustees. But it is unlikely to cover everything a potential candidate will want to know.

This is where a recruitment pack comes into its own as a space to provide more detailed information about the charity, its achievements and future plans, and what it expects from trustees.

What do you wish you'd known before you became a trustee? Is it useful to include this in your recruitment pack?

**"We now have a full set of resources to continue to use in the future, including an advert, recruitment pack and induction pack. This will really help our succession planning, as we can continue with board recruitment as part of an annual plan."**

Board of trustees  
Well Women Centre

# THINGS TO INCLUDE IN YOUR RECRUITMENT PACK

## What the trustees' role is

Explain the trustees' role in your context and the role of trustees generally. For example, do you have an executive team that runs the charity on a day-to-day basis? There are lots of useful trustee role descriptions available, but be mindful that they may include jargon that could deter some people, so you may want to adapt them so the language reflects the 'voice' of the rest of your recruitment pack.

You could also signpost Getting on Board's [How to Become a Charity Trustee guide](#), which contains lots of information about what a trustee is, what roles can look like in different organisations and some of the skills trustees might need. [The Charity Commission for England and Wales](#), [Scottish Charity Regulator \(OSCR\)](#) and [Charity Commission for Northern Ireland](#) also produce guidance, so applicants can find out more.

It's important to let aspiring trustees know:

## The type of people and qualities you're looking for

Include professional skills, protected characteristics, lived experience, specific qualifications, interests – and why these are relevant to your charity.

## What's so great about trusteeship?

Consider including a quote from an existing trustee about what they value about the role.

## More detail about the charity

You can include who the other trustees are and their skills and experience (but be aware of how this might be intimidating to those with less life, work or boardroom experience), what the charity does, and any relevant points about its current situation (e.g. whether it is expanding, developing a new strategy, embedding services after a period of change, etc.). Even if you're experiencing some tricky issues you can frame these positively, so they sound exciting rather than insurmountable! Many new trustees join charities precisely because they are looking for new challenges.



## What the commitment is

This should be in terms of role, time and ways of engaging with the charity. For example, whether it simply means attending four board meetings per year or whether there are committees to join, other volunteering opportunities, or a need for trustees to be involved in day to-day management. Is this a requirement or can the charity be flexible depending on what applicants are able to offer?

## The legal responsibilities

Aspiring trustees may well want to know what their legal responsibilities are and their personal liability on becoming a trustee. It's a good idea to include some signposting to this. A useful starting point is Getting on Board's guide [How to Become a Charity Trustee](#). The different responsibilities trustees have are also explained in the Charity Commission's [5-minute Guides for Charity Trustees](#) (and short [videos](#)) and its guidance [The Essential Trustee: What You Need to Know, What You Need to Do](#).

## That the role is unpaid

It's good to let prospective applicants know that reasonable expenses will be reimbursed, so they know they won't be left out of pocket.

## What support will be put in place

For example, to make board meetings accessible, or to provide training and/or mentoring. If you've mentioned board awaydays, lunches or dinners within the time commitment, you could mention that the charity will meet the cost of these. This includes overnight accommodation (as needed), and if different dietary requirements and other needs will be catered for.

## Whether previous board experience is needed

Think carefully if you are considering asking for previous trustee experience as it could significantly reduce your pool of applicants. With the right support, someone can learn how to be an effective trustee – it may be far more difficult for the rest of your board to develop the skills someone could otherwise bring to the table. If previous board experience isn't needed, why not say this explicitly?

## How to find out more

For example, via your charity's own website or its entry on the Charity Commission for England and Wales's Register of Charities. Or tell them how to arrange a brief call to discuss the role. Some people will prefer to talk about the role and application process, so if you're able to provide a named contact for them to speak to instead of a written pack, then that can work well, too. If you can have both options available, then great – but don't make it compulsory for potential applicants to have a conversation.

# COMMON QUESTIONS AND CONCERNS TO CONSIDER

## “I don't know what a trustee is”

Many people are interested in becoming a trustee but don't necessarily understand what it entails – and it will look different depending on the size and type of the charity, and what stage it's at in its development.

## “I don't know if I have enough time to do it”

The time commitment can vary significantly from one charity to another. What's involved for your charity and does this relate to just trusteeship or are individuals expected to volunteer in other ways?

## “Trusteeship is just for senior professionals or retired people”

Trusteeship is not a 'closed shop' or only for older or retired professionals – show that you welcome applications from people from all walks of life including different work backgrounds or career stages.

## “My employer won't want me to be a trustee”

Some people worry that their employer won't support them giving their time to being a trustee, but often the opposite is true.

## “I could be personally liable if I make a mistake”

This is a common concern but one that rarely materialises. We've included guidance in [How to Become a Charity Trustee](#), which you can signpost.

**As with your advert, make it personal to your charity. Reflect both what your charity does, but also what your aspirations are for new trustees.**



We've brought together examples of different [recruitment packs](#).



Support  
for **you**,  
your **family**,  
your **friends**  
and your  
**community**

mission is to help  
healthy and happy  
relationships in all  
your life



# 04

## TARGETING YOUR ADVERTISING



How you target your advertising is just as important as what your advert says. The key is to reach the type of people you're looking for.

## TRUSTEE TRUTHS



### Starting with a conversation

**“My first interaction with the charity was a conversation. The trustees explained what they do and what activities they carry out. If the process had been overly formal it would have put me off. With my charity, before I even got to that formal process of sending over a CV I'd been able to have very real conversations.”**

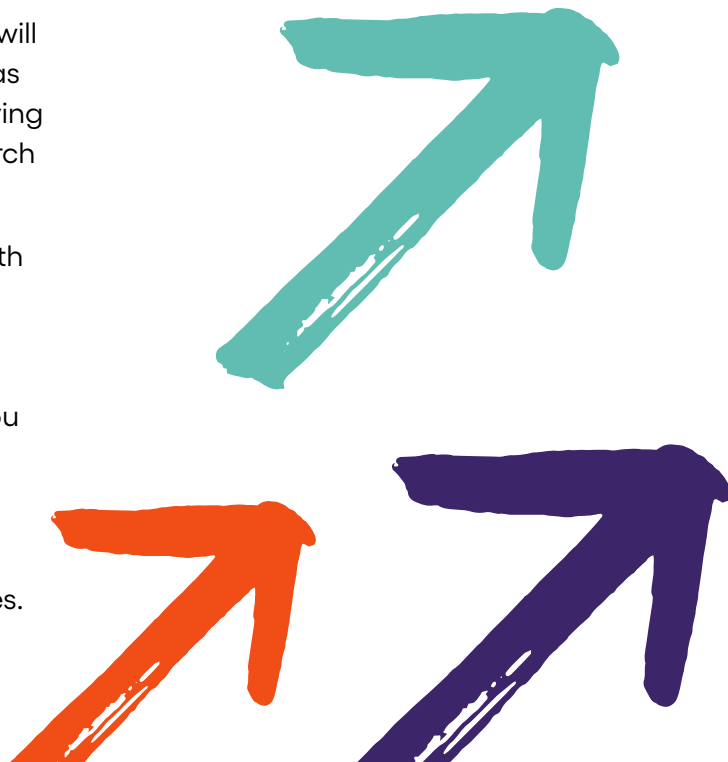
**Chinelo Nnadi**

Medical student and trustee at Springfield Advice and Law Centre

Working out where to put your advert so it will be seen by the applicants you want is just as important as what it says. It's well worth giving this careful thought and doing some research about the options available in your area.

We've compiled a quick reference guide with useful links to different organisations and networks that may help you advertise your vacancy. There's further guidance below to help you decide which one(s) will enable you to reach your target audience.

There are various great trustee-finder websites out there that provide a useful platform to advertise your trustee vacancies.



### Some websites target specific skills – for example:

Bar in the Community advertises trustee vacancies to lawyers and others who are legally qualified.

The Institute for Chartered Accountants in England and Wales (ICAEW) has a dedicated volunteers website aimed at individuals with finance and business skills.

The Honorary Treasurers Forum can also reach individuals with finance experience.

Digital Trustees reaches potential trustees with digital experience.

Other sites are more generalist, so may not help you target your search quite so easily. Some still target particular demographics or enable you to specify certain skills you're looking for, which applicants can filter. Some are paid-for, but many will enable charities to post their voluntary roles for free.

### Sites we recommend:

Reach Volunteering enables you to specify particular professional skills that you're looking for.

Goodmoves, Inspiring Scotland and SCVO advertise trustee roles in Scotland.

Volunteer Now advertises trustee roles in Northern Ireland.

CharityJob (free for voluntary roles) is particularly good if you are recruiting trustees with skills common in the charity sector, such as fundraisers.

Women on Boards offers free advertising to women using their platform.

Action for Trustee Racial Diversity will support you to recruit Black and Asian trustees.

Young Trustees Movement will support you to recruit potential trustees aged under 30.

#QueerTrustees is a campaign on Twitter to improve the representation of LGBTQIA+ people on trustee boards.

# PROACTIVE DIRECT ADVERTISING

## Trustee-finder websites reach those who already know they want to become a trustee.

Although it's not an approach you'd necessarily use to recruit paid staff, carrying out some proactive advertising directly to your target audience can bring people on board who wouldn't otherwise have taken the first step to becoming a trustee.

Your skills audit – however formal or informal – and person specification provide your shopping list of who you want to attract. Use that information to help you identify where the people you're trying to attract hang out – where do they spend their time, what type of media do they look at and where will they see your advert?

If you're proactively reaching out to individual companies or networks, it can be crucial to find a gatekeeper who will share or forward your advert internally. These are individuals who have decision-making authority or can connect you with the relevant contact within the organisation. This might be someone you already know who works for the organisation, the general contact listed on their website, or a senior member of staff you can see listed on the organisation's website or LinkedIn.

## Networks and organisations to consider

Workplaces and large local employers – they will often have departments and individuals with the skills you're looking for (e.g. HR, IT or operations).

Business parks and chambers of commerce that give you access to a range of business contacts.

Business networks and membership bodies (e.g. the [Society of Black Lawyers](#) or [Women on Boards](#)).

Professional bodies or associations for particular skills such as fundraising, HR, marketing or PR experience.

Charities that work with service users who have the attributes you're looking for (e.g. disabled people or those with lived experience of a particular issue).

You can use the advanced search on the [Charity Commission for England and Wales's Register of Charities](#) to find charities local to your area. You can also search the [OSCR register for charities in Scotland](#) and filter the [register of the Charity Commission for Northern Ireland](#).

Publications, websites or online networks relating to specific professions or groups (e.g. the Chartered Institute of Fundraising's [regional and special interest groups](#)).

Social media and interest groups, to reach out to a wider digital network or using paid-for (but low-cost) advertising (e.g. LinkedIn, Twitter and Facebook).





## CHARITY CASE STUDY



### Our five new trustees bring passion and skills

We had not explicitly advertised trustee roles previously and had always recruited purely by word of mouth. Undertaking the process of developing an information pack and advert, and marketing the opportunity enabled us to think about the trustee role, the benefits both to the organisation and to the potential trustees themselves, and to package that in a way that clearly communicated this.

The methods we used were:

- Emailing existing trustees and staff with the recruitment pack
- Posting on Facebook, Twitter and local Facebook pages
- Posting on CharityJob and ICAEW websites
- Direct emailing Mental Health Trust and local digital marketing agencies to get people from specialist agencies

The trustees we recruited comprised a mental health specialist who had a historic connection with the charity and responded when we contacted the Mental Health Trust; a charity digital marketing manager through the Do It website; a local businessman who we had some contact with as a corporate partner and was excited about the opportunity of being involved more strategically; and a communications professional who had applied for one of our paid roles but fitted more appropriately as a trustee.

By spreading our net further, we have been fortunate enough to recruit trustees that are both passionate about our cause and bring specific skills and experience to help our charity develop further.

#### Trust Links

South East Sussex mental health charity



## OTHER PLACES TO ADVERTISE

**As well as a more proactive approach, it may also be worthwhile to try some more traditional methods for getting your advert out there:**

- Your own website, social media, newsletters, service premises
- Local newspapers, newsletters, e-magazines, neighbourhood magazines
- Posters in libraries, supermarkets, community centres
- Volunteer centres, councils for voluntary service (CVSs), membership bodies
- Organisations that help connect charities with individuals searching for a trustee role at no cost to the charity, such as [The Fore](#)
- Reach Volunteering offers a paid-for consultancy executive search service called [TrusteeWorks](#)
- Recruitment agencies (not an option for every charity, but if you have the budget this is something to consider)



# MAKING THE MOST OF YOUR NETWORK

Using open trustee recruitment methods doesn't mean ditching your existing network of contacts entirely.

Instead, think about how you can use your network more creatively – use it to get the word out about your advert, rather than simply asking those you know personally to apply.

For example, if you want a trustee with experience of social work, who do you know who may have connections within this sector? Your neighbour may be a social worker or you might have a friend who's had contact with social services through voluntary work they do. You can then ask them what networks exist locally, or who they could recommend contacting to circulate your advert to social workers or others with relevant experience or background in a similar field.

“Instead, think about how you can use your network more creatively – use it to get the word out about your advert, rather than simply asking those you know personally to apply.”



# TAILORING YOUR ADVERT

As well as targeting where you advertise, you may want to tailor the format of your advert, so it resonates more with your target audience.

For example, it may be more effective to produce a video ad to attract a trustee with digital skills. Younger people may be more drawn to a graphic or meme on social media than a listing on a trustee-finder website.





# HOW LONG TO ADVERTISE

**In your advert, it's really helpful to include a deadline for applications, to prompt individuals to apply.**

The application period needs to be long enough to give a sufficient number of people time to see the advert and ask questions, but short enough that those interested in the role are motivated and reminded to apply.

We've found that 6-8 weeks is a good timeframe to use, although this will also depend on the advertising methods you've used and the time of year. If you're proactively contacting a large local employer, then make sure this works with the date they will circulate it to their employees.

If you find that you don't have a suitable range of applicants, then you can always extend the deadline or re-advertise, knowing that you've already got the advert and recruitment pack ready. Don't forget to let existing applicants know – and progress their application in the meantime if you can, so they don't lose interest.

Remember to take your advert down once you've recruited! It can create a poor impression to see a very old advert and is frustrating for applicants who apply only to find out you've already appointed new trustees. If you're using trustee-finder websites, many will enable you to set a specific date range for your advert.



# FINDING WHAT WORKS FOR YOU

**It is unlikely that one single recruitment method will capture large numbers of applicants.**

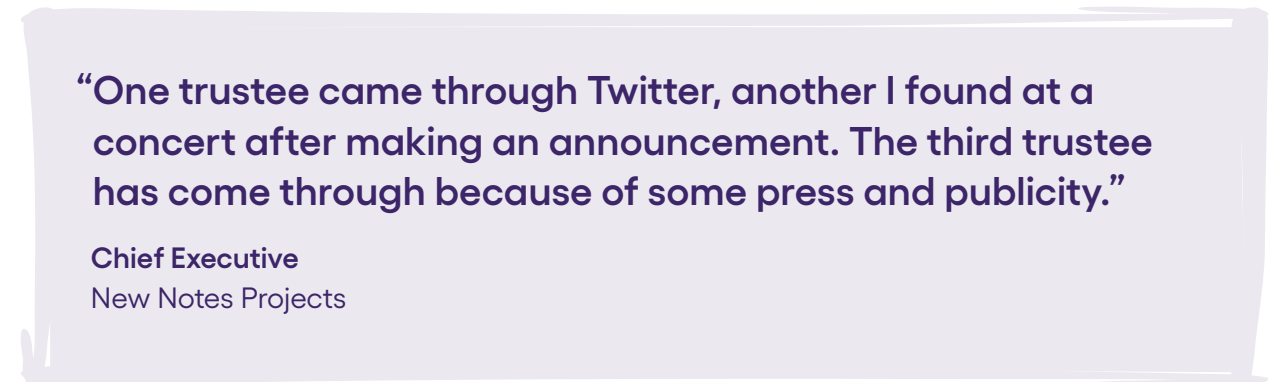
Nor will it be practical or proportionate to try out every method available. Your recruitment campaign is about quality not quantity, so try out three or four different methods for targeting your advert to see what generates a reasonable number of good candidates.

You could see what interest you receive initially and then try another two or three methods if you haven't generated as much interest as you'd hoped. And remember that what works for one campaign might not work next time, particularly if you're looking for different skills or types of experience.

It's important to keep track of the interest and applications you've received as you go through the recruitment process and afterwards. This helps you to keep in touch with applicants during the application process, and to identify recruitment methods that worked particularly well for you that you might want to use in future. Once you've finished your campaign, you can capture this information in summary form, so you don't need to retain personal data.

**“One trustee came through Twitter, another I found at a concert after making an announcement. The third trustee has come through because of some press and publicity.”**

**Chief Executive**  
New Notes Projects



# TRUSTEE TRUTHS



## Using our networks to spread our ad

The Canaan Project is a youth work charity founded in Tower Hamlets by a local church and inspired by our Christian faith. We wanted to recruit an experienced youth worker to our board (as one of the skills we'd identified). We initially struggled to think where we might advertise to encourage applications from people with the right experience. But we then realised that we already had links with many relevant networks including: London Youth; a Christian youth work network; and an umbrella body for Christian charities, many of which work with young people. We hadn't thought of these networks as possible sources of trustees before.

We realised networks can do more than we first thought – using the people you already know to help get the word out is really easy!

### Board of trustees

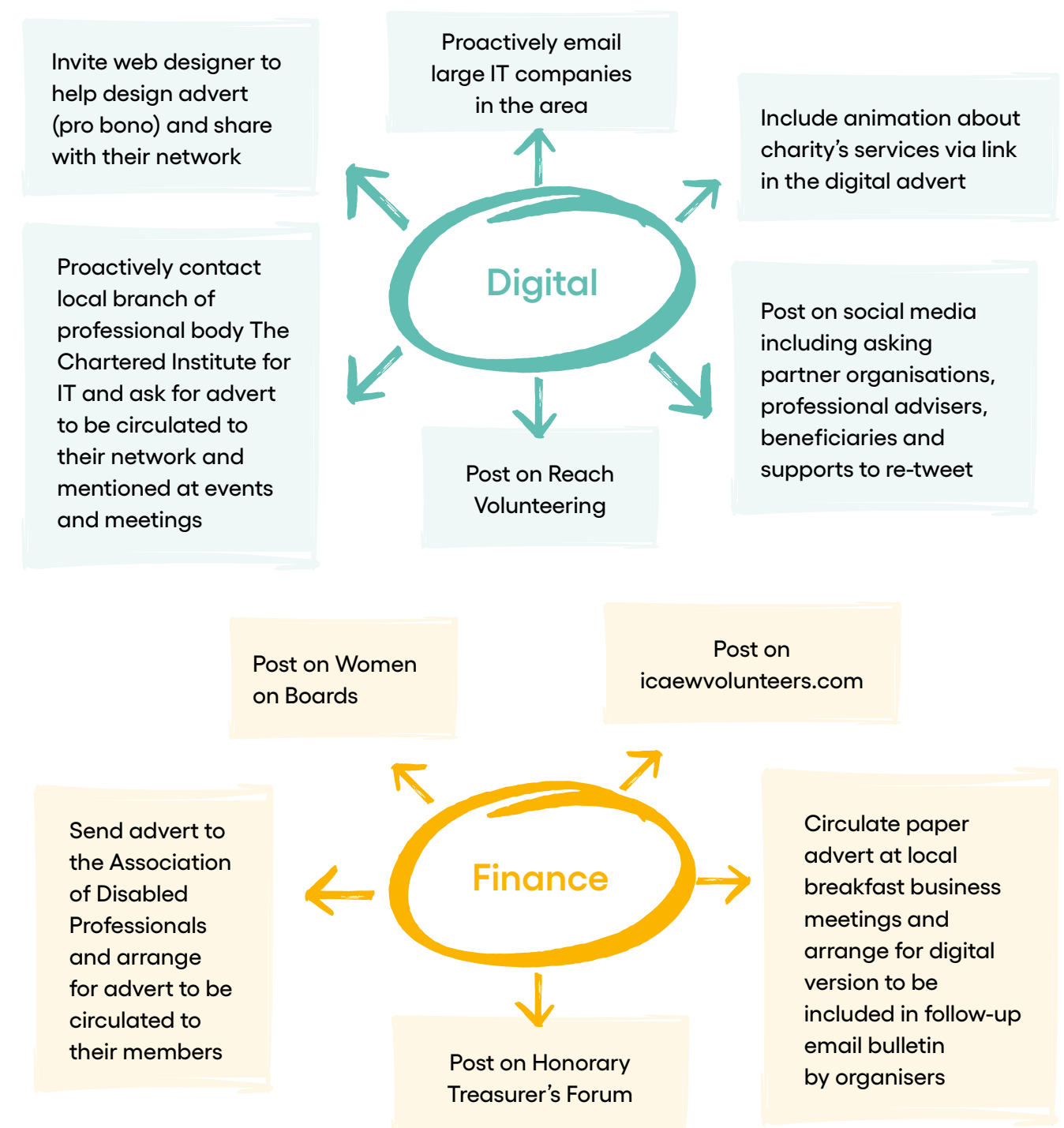
Canaan Project



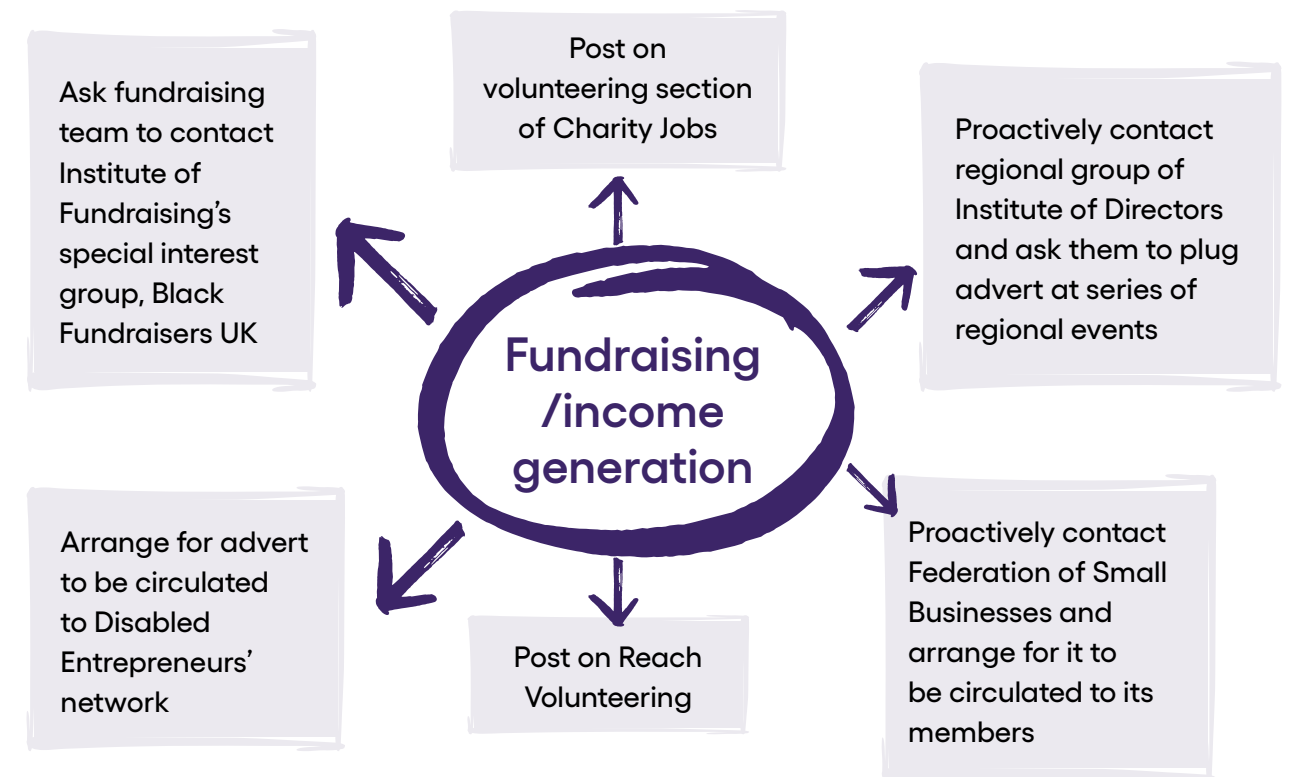
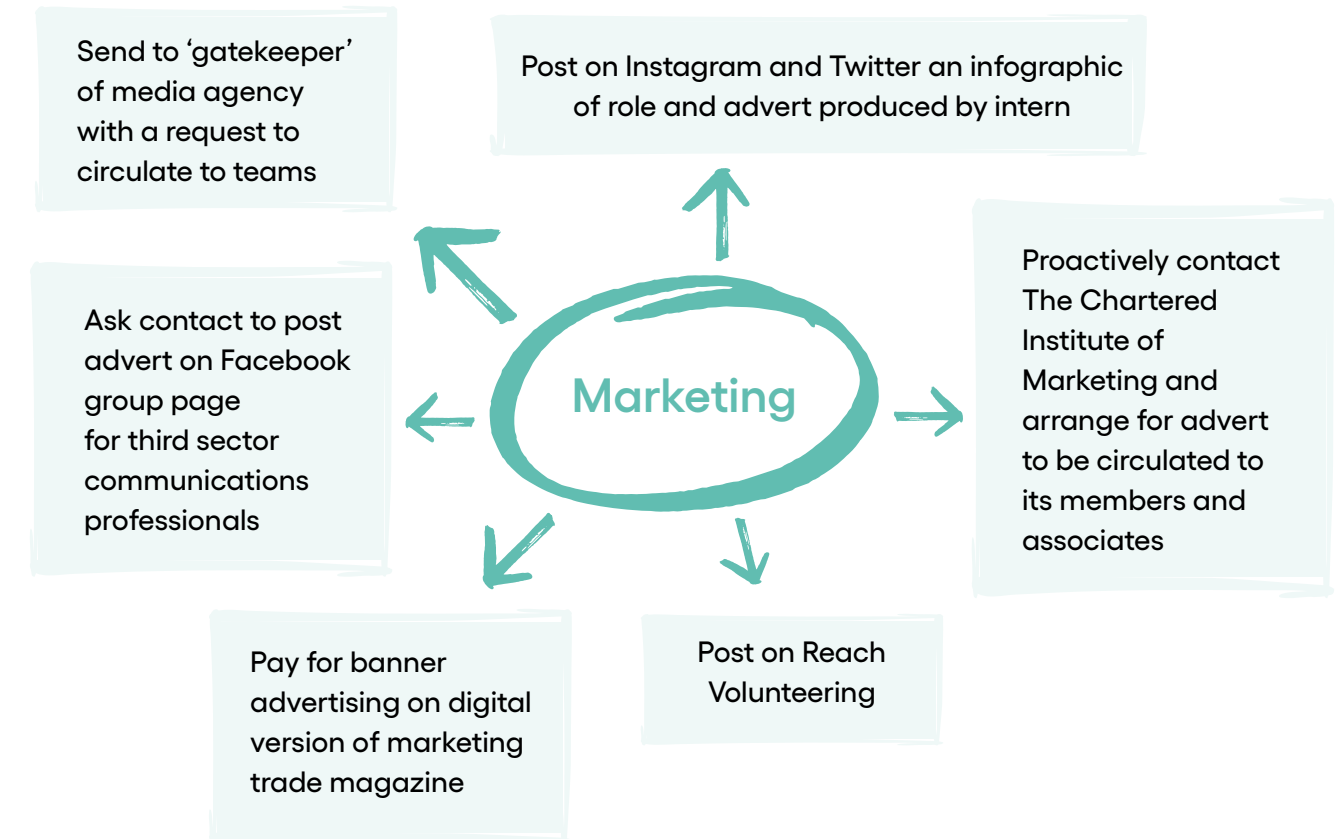
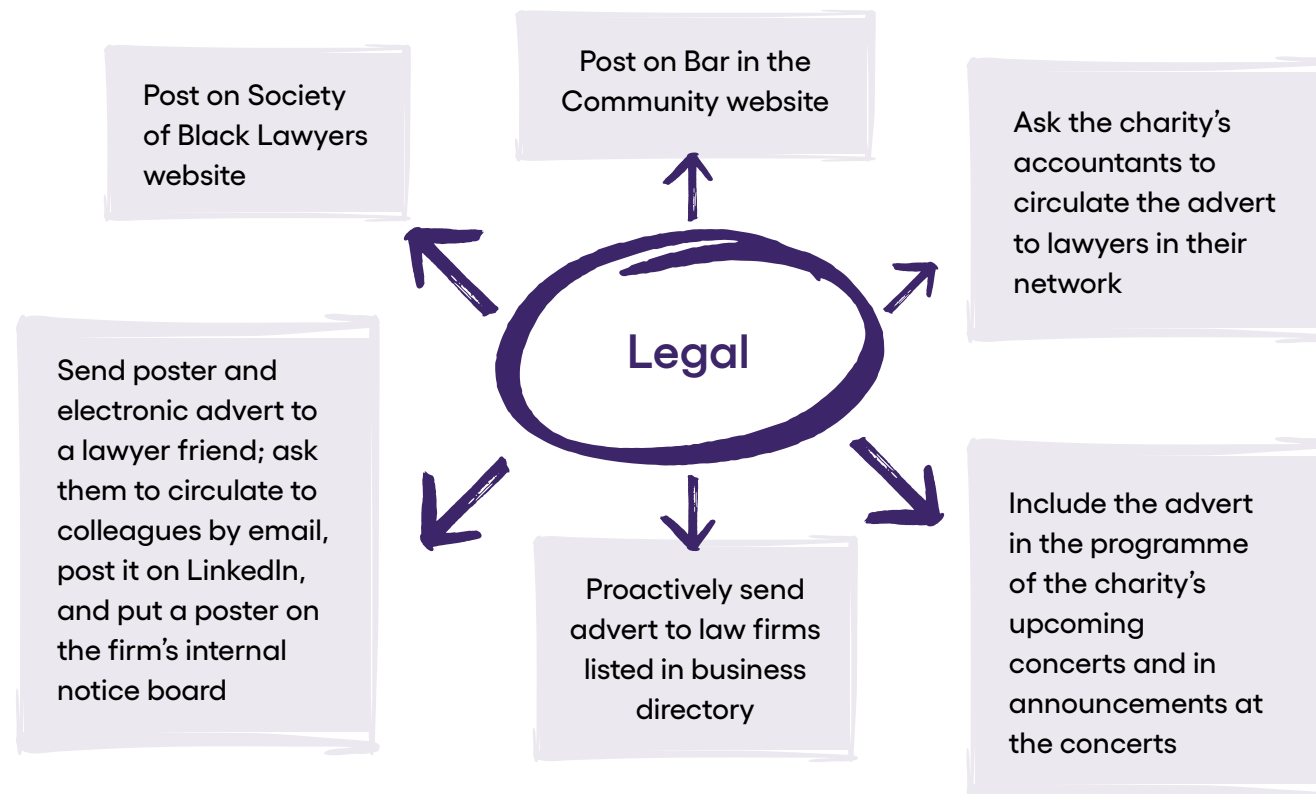
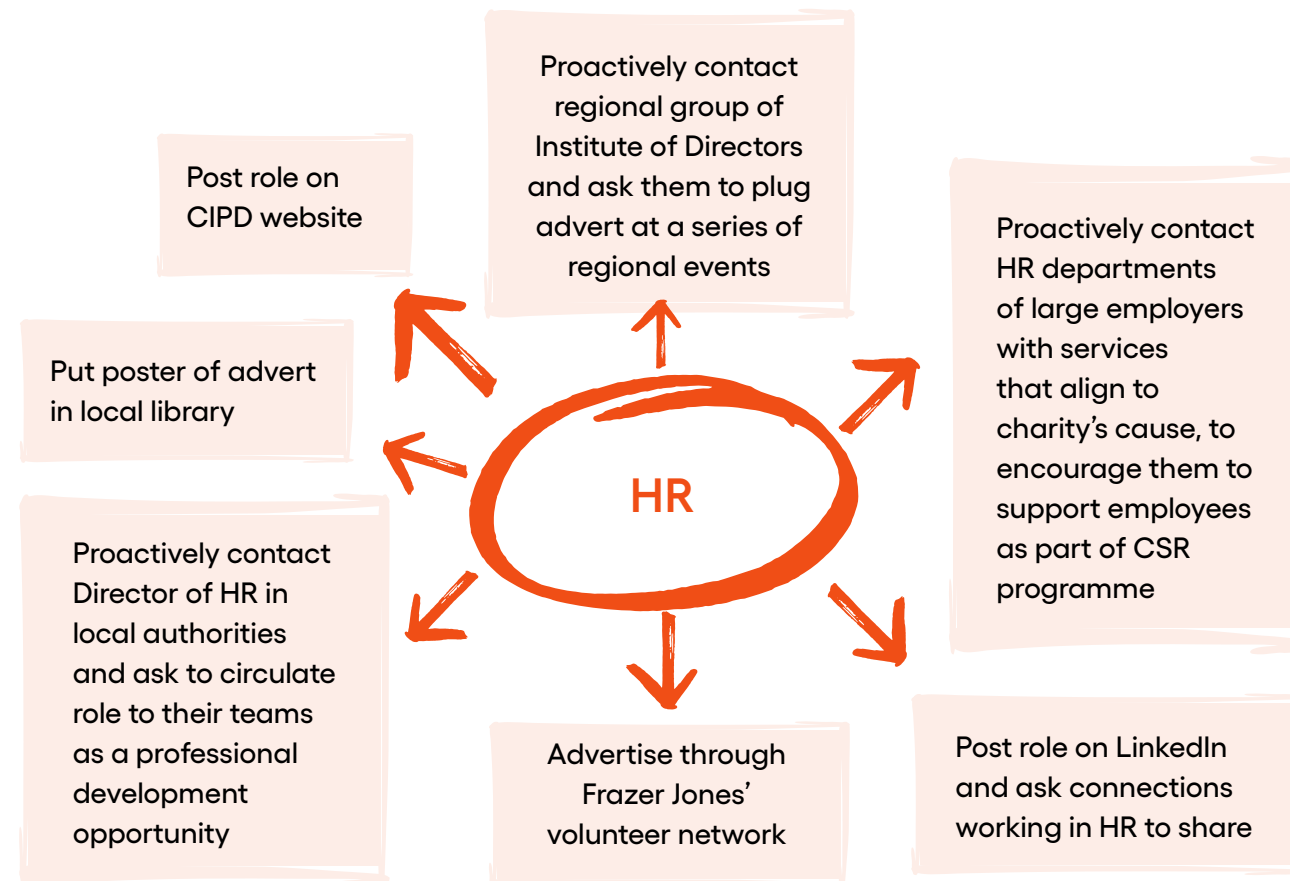
Flying Scholarships for Disabled People charity; photography by David Higham

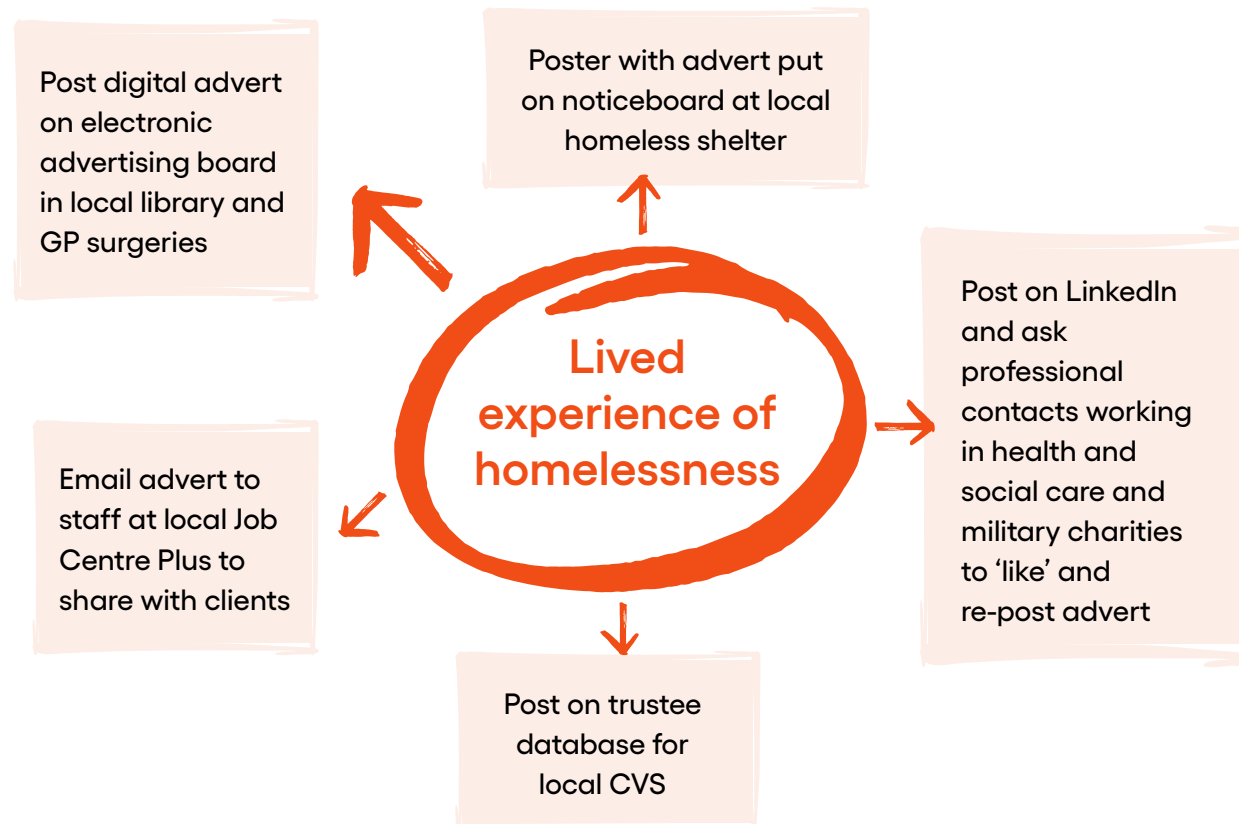
# LOOKING FOR SPECIFIC SKILLS?

Here are some ideas for reaching out for commonly sought-after skills and experience.









Wellbeing of Women Centre charity

# TRUSTEE TRUTHS

\*#\*!!

## Reaching new networks

My boy was born in 2007 and diagnosed with Nicolaides-Baraitser syndrome. He was the second person ever to be diagnosed and there was very little information. I remember walking out of Great Ormond Street Hospital, feeling all alone. In 2010, I set up a Facebook group. I was motivated not to let other families go through that and be as isolated. In 2020, we officially became a charity.

The initial board of trustees was made up of all parents. When the old chair of trustees stepped down, we came to the realisation that we needed to go outside of that group to grow the board and meet the challenges we have as an organisation. We wanted to have a more diverse board, in terms of gender, age, people of colour – and particularly younger trustees.

Going on Getting on Board's [Transform programme](#) was absolutely brilliant, we didn't have any process in place before that. I took 20 pages of notes on how to recruit!

First of all, we did a skills audit of what was lacking on the board and worked out we needed charity governance, medical research, marketing and campaigning, fundraising and grant application skills. We were looking to recruit 2-3 new trustees.

Our trustee information is 10-12 pages long and has pictures of people affected by the condition, experiences, what we need from trustees and the requirements of the role. We were very clear about time commitment and also how we accommodate carers. We put a lot of information in because we feel you've got to be open and honest.

We had an online application Google form which helped with accessibility – 16 applications came through that way, so I think that made a big difference.

We've got a new chair and all the other trustees are non-parents. It's had a huge impact; it's been astronomical.



**Lee Reavey**  
Co-founder and trustee of the NCBSR  
Worldwide Foundation





## 05

**CONVERTING  
INTEREST INTO  
APPLICATIONS**



**During our programmes, some charities reported they'd had initial interest from individuals that didn't then translate into applications. Here are some tips for converting interest into applications.**

### **Limit the number of steps**

Make the number of steps in the process as few as possible – particularly if you're a smaller, local charity. If the recruitment process seems daunting or onerous, what impression does this give about actually becoming a trustee?

### **Give timelines to applicants**

Make sure they're clear about the process.

### **Allow applicants to ask questions**

If you can ensure they'll be available, give a named contact to speak with potential applicants by phone or in person. Alternatively, make sure whoever is answering queries from individuals is well-briefed on the role and the application process.

### **Actively encourage**

Remind suitable people to finalise their application – don't assume they will just because they made a phone call to find out more. Be clear about how they need to apply, as they may think they have applied just by making the call.

### **Share your message widely**

Reinforce your messaging by ensuring your advert is available through a variety of channels including on your website and social media. This also gives individuals the best chance of applying, as they don't need to remember where they initially saw the advert.

### **Respond quickly**

Remember, the application process is as much about potential candidates testing out whether you're the right fit for them as it is about attracting the people you want. Ensure each interaction they have with you is a positive one. Respond to queries quickly and helpfully, and don't leave existing applicants hanging if you have to extend deadlines or change interview dates.

### **Hold an open day**

As part of your charity's programme of events you could consider holding an open day or online information session, or providing individuals with the opportunity to join an advisory group or volunteer with the charity.

# **TRUSTEE TRUTHS**



## **Our charity is quite niche, but we had lots of interest**

Yachad is a charity that works within the Jewish community to build support for a political resolution to the Israeli-Palestinian conflict. The work that we undertake is highly sensitive, and it limits where we can recruit trustees from, as those that sit on the board of the organisation have to be highly engaged in both the issue and the community in which we are working.

Despite our limitations on recruiting trustees, we realised we hadn't invested enough time in making sure we had potential new trustees to replace those coming off the board, and therefore we needed to do a larger recruitment drive.

The director and chair of the organisation attended a Getting on Board workshop, which enabled us to set aside time to put together an advert which we could use to recruit trustees. We circulated the advert within our current networks and amongst supporters. We had excellent feedback with many people coming forward expressing interest.

This has enabled us to narrow down a list of seven new trustees that we now are working with to bring onto our board over the coming 12 months, and we also have a wider list of people, so when we need to recruit in the future, we have a pool of people that we can potentially recruit from which should enable us to find new trustees more quickly.

Taking part in [the Getting on Board trustee recruitment programme] forced us to set aside the time to actually consider the process of recruitment properly, and we were also able to gain expert input into our recruitment advert which enabled us to successfully advertise and recruit for trustees.

**Trustee**  
Yachad







## 06

**SHORTLISTING  
AND INTERVIEWING**

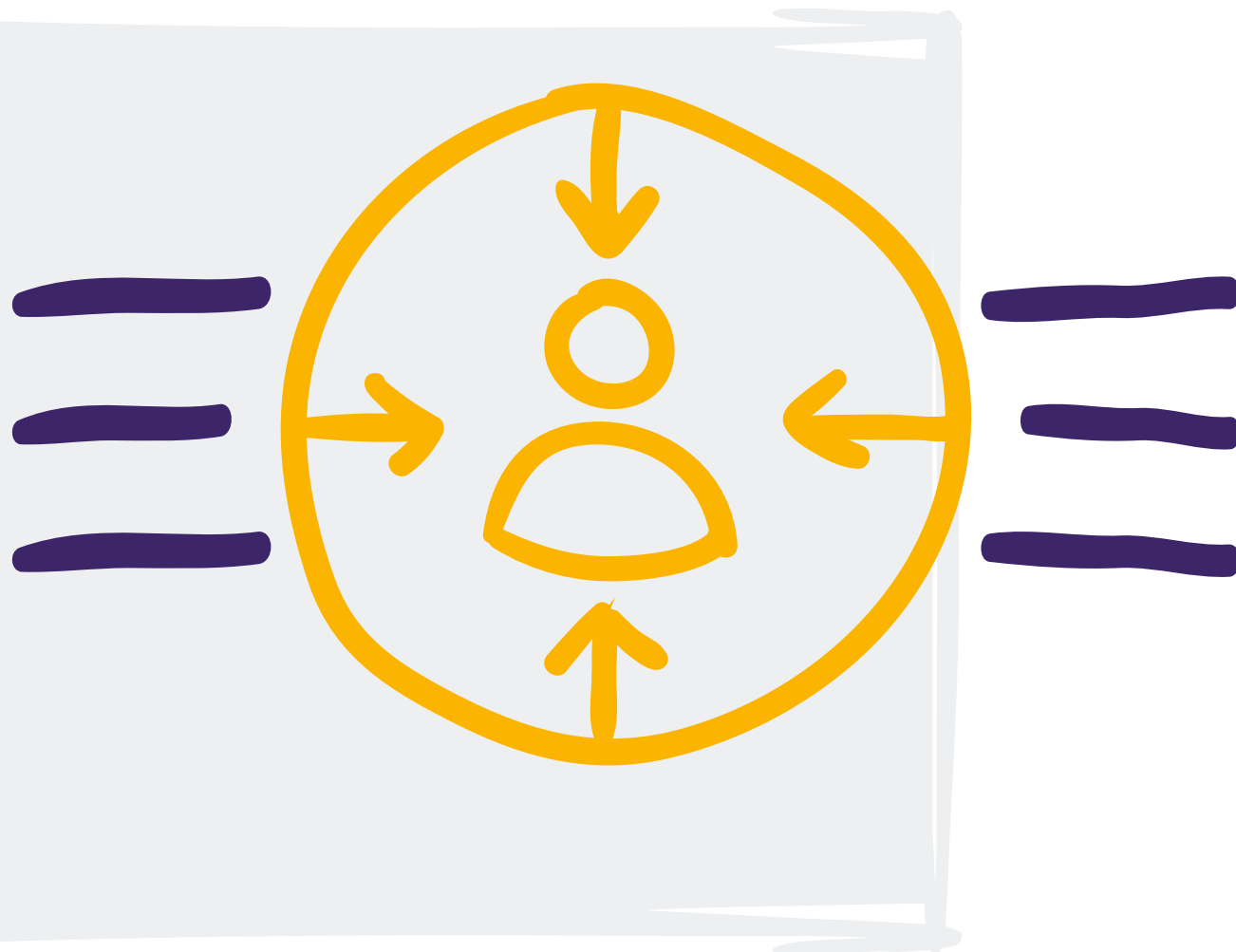


**Remember, it's not about the number of applications you receive but the quality of applications, and whether prospective trustees meet the criteria you're looking for.**

For both shortlisting and interviewing, it is important to be clear from the outset what criteria you are using to assess applications, including which are essential and which are desirable. This will help you to treat applicants fairly and prioritise those who most closely match what you're looking for. This should tally with the person specification you put together, based on your skills audit.

You should shortlist applicants, even if you only have a small number of applications. Otherwise you could end up interviewing people who it's clear from the outset don't have the qualities the charity is looking for – which is a waste of their time and yours. At the planning stage of your campaign, you can decide who will carry out the shortlisting. Ideally, they will receive applications that have been anonymised to minimise unconscious bias which might lead them to favour applicants with backgrounds similar to their own.

You can find a shortlisting template on our [resources page](#).



# TRUSTEE TRUTHS

\*\*\*!!

## Recruiting the right people

Don't recruit just because somebody has shown an interest in your organisation – they have to have the correct skills/experience. Taking the time to think about what we actually wanted before rushing ahead really helped us to focus.

### Board of trustees

TLC: Talk, Listen, Change





# A FRIENDLY CHAT

**You should interview all shortlisted applicants, whether they are already known to the charity or not.**

This ensures everyone is treated fairly and, even if a candidate is already known to the charity, gives both parties a chance to learn more about each other and whether they'd be a useful trustee. This doesn't have to involve a very formal interview panel, but could instead be a friendly chat over coffee, or a phone or video call. Again, choose what is appropriate for your charity.

Give some thought at the outset to where interviews will be held, whether there are suitable facilities for those with mobility issues, and/or whether you will use technology (such as videoconferencing) or ask candidates to meet face to face.

You'll need to decide who will conduct the interviews and it should be the same person or people for all candidates. The chair will usually be involved in interviewing, and possibly other trustees and/or the CEO if you have one. (But bear in mind they are essentially recruiting their own boss!)

You might also ask an independent person to join the panel – someone who has more expertise in the skills and experience that you're looking for in candidates.

For example, your charity's web designer or communications officer for digital and/or marketing, professional advisers for legal or accountancy, or a service user or friend who has lived experience of your charity's cause.

You can invite your expert to give their recommendation on the choice of successful candidate(s), but the final say on who to recommend for appointment or election should rest with current trustees.

**“Give some thought at the outset to where interviews will be held, whether there are suitable facilities for those with mobility issues, and/or whether you will use technology (such as videoconferencing) or ask candidates to meet face to face.”**

# INVOLVE SERVICE USERS

**Many charities have people with relevant lived experience on their trustee boards to help them ensure they are making decisions that lead to relevant and effective support for the charity's clients.**

There are also several options available to involve the people your charity currently supports in the recruitment process. One way is to ask someone who uses the charity's services to sit on the interview panel. Other options include inviting candidates to meet with some of your service users informally (either before the interview or separately) or to visit the charity's services. This will help you to gauge how candidates interact with the most important people in your charity.

Make sure each person is briefed and that everyone has a copy of the questions you will ask.





# STRUCTURE OF THE INTERVIEW

**An interview can be a nerve-wracking thing for many people, even if it's quite informal.**

You want to give candidates the opportunity to show you the best of themselves. Putting them at ease at the outset and setting the right tone for the conversation can be really helpful.

- Provide an outline of what your charity does and why you're recruiting for new trustees.
- Give a summary of how the interview will work, and explain what you are looking for and why – note that you don't necessarily expect to appoint all applicants (which will manage expectations and provide reassurance to candidates who aren't appointed).
- Ask candidates if they would like you to explain the role of a trustee, to ensure that there is a level playing field for those who have been a trustee before and those who have not.
- Ask each of your prepared questions, but try to keep the atmosphere relaxed and conversational.
- Leave plenty of time for candidates to ask questions
- Confirm what the next steps will be (e.g. that you have another couple of interviews, but expect to notify candidates of the outcome within the next week). You may also want to reiterate the process for formally appointing or electing new trustees, and the relevant timeframes.

We've produced some [sample questions](#), as well as a [template interview sheet](#) to use for each candidate.

All candidates should be asked the same basic questions, but you can then ask follow-up questions and probe further to gain more understanding. Ask for specific examples to demonstrate each candidate's experience. Even if they haven't been a trustee before, they may have used comparable competencies in a different context, which they can describe to show they would be suitable.

It is a good idea to tell candidates in advance what to expect from interview (e.g. who will be there, how long it will last, etc.). You might also tell them what you intend to ask, either by providing the questions in advance, or giving an overview of the topics the interview will cover.





# TRUSTEE TRUTHS



## Bringing conversation into a formal process

Understanding the charity's needs and the candidate's interests and how these interact, through a conversation/discussion is sometimes much better than just a formal interview process.

## Trustee and Getting on Board focus group participant

It is useful to take notes, and to give a score for each question, as it's unlikely you will remember all the answers each person has given. This will help you to compare notes with others on the panel, ensure you're treating each candidate fairly and confirm the extent to which each person has met the criteria you're looking for.

Remember, the interview stage is as much an opportunity for applicants to test out the charity as it is for you to find out more about them. Why not use it as a chance to show off the great work that your charity does? Whether they are ultimately successful or not, the process should be enjoyable for all candidates.



# AFTER THE INTERVIEW

**Once the interview process is complete and you've decided on which candidate(s) to appoint, remember to inform unsuccessful candidates quickly, as well as those you've selected.**

They have put time and effort into applying to be a trustee and even if they aren't the right fit for your organisation at this time, it's important that they have a positive experience of the process, so that it doesn't deter them from applying for other trustee roles.

We've put together a [template email](#) which you can find on our resources page. You can use this to inform those candidates you've decided not to appoint.

Even if they don't join your board, the experience they have is likely to shape whether they apply for other trustee roles in future. And they may still become a supporter of your cause.

There may be other things you want to include during or after the interview stage. It is becoming increasingly common for boards to invite potential trustees to observe a board meeting before both sides decide on the appointment, although this would only be for candidates you already know you're highly likely to appoint.

This can provide an invaluable insight, but should be timed carefully to avoid delaying the recruitment process unnecessarily. You will also need to think about what is on the agenda and whether there are any sensitive or contentious issues that would not be appropriate to discuss with a visitor present.

Candidates should also be clear that any discussions are confidential, and be briefed on how they are expected to conduct themselves. For example, they may be invited to introduce themselves to trustees at the start of the meeting, but then simply observe without making any other contributions. If you decide to offer a board observation, it may also be helpful to arrange a follow-up conversation with the chair to deal with any questions candidates have.

# TRUSTEE TRUTHS



## Involving service users in trustee recruitment

The involvement of users of the charity's services was invaluable to me as a candidate and the organisation. It was one of the biggest selling points for me and the most enjoyable part of the recruitment process.

Trustee and Getting on Board focus group participant



# WHICH CANDIDATE?

**You may also find that you have a very impressive applicant (on paper and/or in person), but they don't neatly fit the person specification you set out or have different skills to the ones you were looking for.**

You should prioritise candidates who more closely fit the skills, knowledge, and lived and learnt experience identified in your 'working out what you need on your board' stage. But you could also look at whether you have sufficient room on the board to appoint an additional candidate (including under the terms of your governing document).

You might have flexibility to appoint more trustees than you'd planned, or you could keep their details for a future recruitment round. It may be that a 'wildcard' applicant has skills and experience that you'd included as desirable rather than essential criteria. Or you might see they have qualities you hadn't picked up in your skills audit, but which really make sense for what the charity needs. It would be a real shame to turn down someone who could turn out to be incredibly useful to the charity.

For all candidates, the key is to be able to articulate clearly what they have to offer and why they should join your board. Of course, this assumes that you have successfully recruited! As with paid staff, it is generally better to appoint no-one than to appoint the wrong person. If you don't feel any of the candidates are suitable, then feel confident to politely turn them down and go back out to advertise. Although this can seem like a lot of work, it is likely to involve less effort than having to manage a trustee who isn't a useful match for the charity.





# BEFORE YOU FORMALLY APPOINT

For your chosen candidate(s) there are a couple of final actions to complete before you formally appoint them:

- Take up references – depending on the skills and experience you're recruiting them for, this might include a professional reference, a personal one and/or one from an education or volunteering context. We've produced a template [reference request](#).
- In England and Wales, ask all new trustees to complete the Charity Commission's [trustee declaration](#) to confirm they are eligible to serve as a trustee and are not automatically disqualified.
- If required, obtain [DBS checks](#).

## TRUSTEE TRUTHS



### Impactful trustees

Thanks to Getting on Board, we have managed to recruit three incredible people and they are already having an impact.

**Board of trustees**  
Heart UK

# 07

## APPOINTING TRUSTEES

**The way you formally appoint trustees will be set out in your charity's governing document. You must follow this to ensure your trustees are validly appointed.**

At the outset of the process, you should confirm how trustees are appointed or elected in your charity. For some charities, the trustees can appoint other trustees at any time; for others, some or all of the trustees are elected by the charity's members at the annual general meeting (AGM); some may also have third parties that have the right to appoint or nominate individuals to serve as trustees.

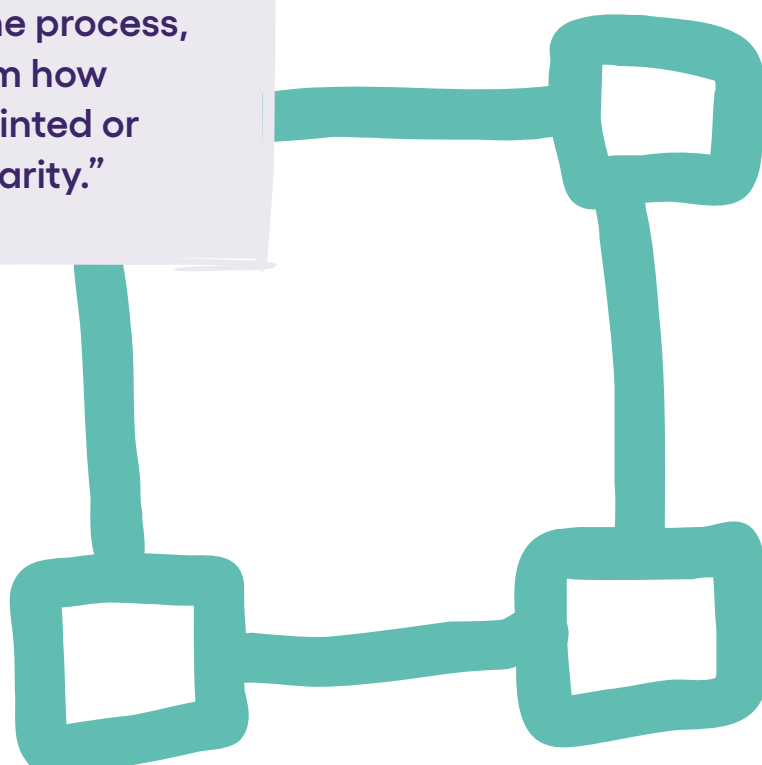
There may be other criteria trustees are required to meet; for example, they have to be a member of the charity. This doesn't necessarily need to be a barrier, as a new trustee can often become a member at the same time that they join the board.

The Charity Commission also provides useful guidance on [finding new trustees](#).

However they are appointed, it is important to confirm to individuals in writing that they have been appointed and the date this comes into effect. Any appointment should be made subject to suitable references being obtained (if they haven't already) and having confirmed that candidates have not been disqualified as a trustee.

Use our [template letter](#) to confirm a trustee's appointment, which also provides information about the induction process.

**"At the outset of the process, you should confirm how trustees are appointed or elected in your charity."**



## A NOTE ON OBSERVING A BOARD

**A potential trustee would only usually observe one board meeting.**

Some charities have used the term 'visiting trustee' to refer to individuals who actively contribute and influence board meetings (and possibly vote on items), but have not 'officially' joined the board. We would advise against this practice: if someone is essentially fulfilling the role of a trustee and significantly influencing board decisions, they may still be regarded as meeting the statutory definition of a trustee even, if they don't think they've been formally appointed.

## TRUSTEE TRUTHS

\*#\*!!

### Observing a board

Being able to observe a board before taking the decision to join is really good. On one of the boards I joined, the protocol was to interview a candidate and then invite them to observe.

**Rachel Dugdale**  
Trustee on several boards



# REGISTERING NEW TRUSTEES

**For charities in England and Wales, once you've appointed your new trustee(s), the Register of Charities should be updated as soon as possible to include their name and provide the Charity Commission with relevant information, such as their contact details for the Commission's use only.**

If your charity is a company, then their appointment as a company director will need to be filed with Companies House. You should also update other stakeholders (e.g. your staff, service users and volunteers), and your website if you provide details of your trustees there.

You can update your trustee details with the Charity Commission for England and Wales, and/or the Charity Commission for Northern Ireland (depending on where your charity is registered), and Companies House (if your charity is a company) at any time. If you're registered with OSCR, you can update your trustee details annually when you file your accounts.

There might be some other practical things to think about; for example, whether a new trustee needs to be added as a signatory to your bank mandate. If your charity is unincorporated, then any land may be held in the names of individual trustees, so this information will need to be updated with HM Land Registry.

The method that you need to use to formally appoint trustees, including the notice period required for meetings, will be included in your charity's governing document. You will need to factor this into the timeframes that you use.





# ELECTION BY MEMBERSHIP

**If your trustees are elected by your membership or nominated or appointed by a third party, that doesn't have to prevent you from advertising for trustees or recruiting for specific skills.**

You can include the type of skills and other qualities that your board needs in a briefing to your members and possibly recommend specific individuals to them who you've identified through open recruitment. Even if you are recruiting from within your existing membership, the same principles still apply about identifying people with the skills you need, making trusteeship accessible and seeking to be diverse.



Boardroom Apprentice charity

# 08

## INDUCTION – DON'T FALL AT THE FINAL HURDLE



## You've put so much effort into a great recruitment campaign, don't squander the great first impression you've created with your new trustee(s) – make trusteeship of your charity a good experience from the start, with a comprehensive induction.

Induction can often be an overlooked part of the recruitment process. But it is important for all trustees, particularly if through open advertising you've attracted good candidates who have less existing knowledge of the charity or haven't served as a trustee before.

An induction won't necessarily happen all at once and may span a new trustee's first 6-9 months.

When you update the Register of Charities with details of your new trustee(s), they will receive a welcome pack from the Charity Commission by email. This provides links to a range of useful Charity Commission guidance, but it can also seem a bit daunting, particularly if this is their first trustee role. You can see what's in the [welcome pack](#).

The induction the charity itself provides will be just as important. It can really help new trustees to settle in quickly and start making a difference for the organisation from the outset. This applies to new trustees who have an existing relationship with the charity, as well as others who haven't engaged with the charity before.

As with other aspects of your recruitment campaign, your induction process should be tailored to your specific context. Why not ask existing trustees what they wished they'd known or what they'd recommend you include?

An induction won't necessarily happen all at once and may span a new trustee's first 6-9 months. Ideally, it will include a mix of documents to read, meetings with key individuals and visits to some of the charity's services. It could perhaps include some online learning or an external training course. This can help new trustees develop their understanding of the role, although we'd suggest that you start the induction sooner rather than later. Talk to your new trustees at an early stage about what they'd like to get from their induction and ways you can tailor the process to cater to them.

If you've recruited multiple new trustees at the same time, this can bring advantages to the induction process; for example, saving time by being able to carry out inductions collectively and/or provide relevant information to several trustees at once. New trustees may provide additional support to one another, and may feel more confident to say if they don't understand or agree with something, or to ask for help in developing into their role. However many trustees you've recruited – and whether their induction is provided collectively or one-to-one – make sure that it provides them as individuals with the tools they need to thrive in their new role.

As part of the Trustee Learning Programme, Getting on Board runs a free monthly webinar that will help you induct new trustees. [The Onboarding: Induction Training for Newly Appointed Trustees](#) focuses on the legal and governance responsibilities that all trustees take on with the role, alongside a range of other highly valuable webinars.

There are a number of documents that should also be provided to all trustees, particularly when they join the board:

- A letter confirming their appointment and the length of their term
- The governing document
- Minutes and board papers of recent meetings
- Financial information/trustees' annual report and accounts for the last financial year
- Current strategy
- Board-approved policies (e.g. for safeguarding, conflicts of interest)

Not all charities will produce the following documents, but they should be provided where available:

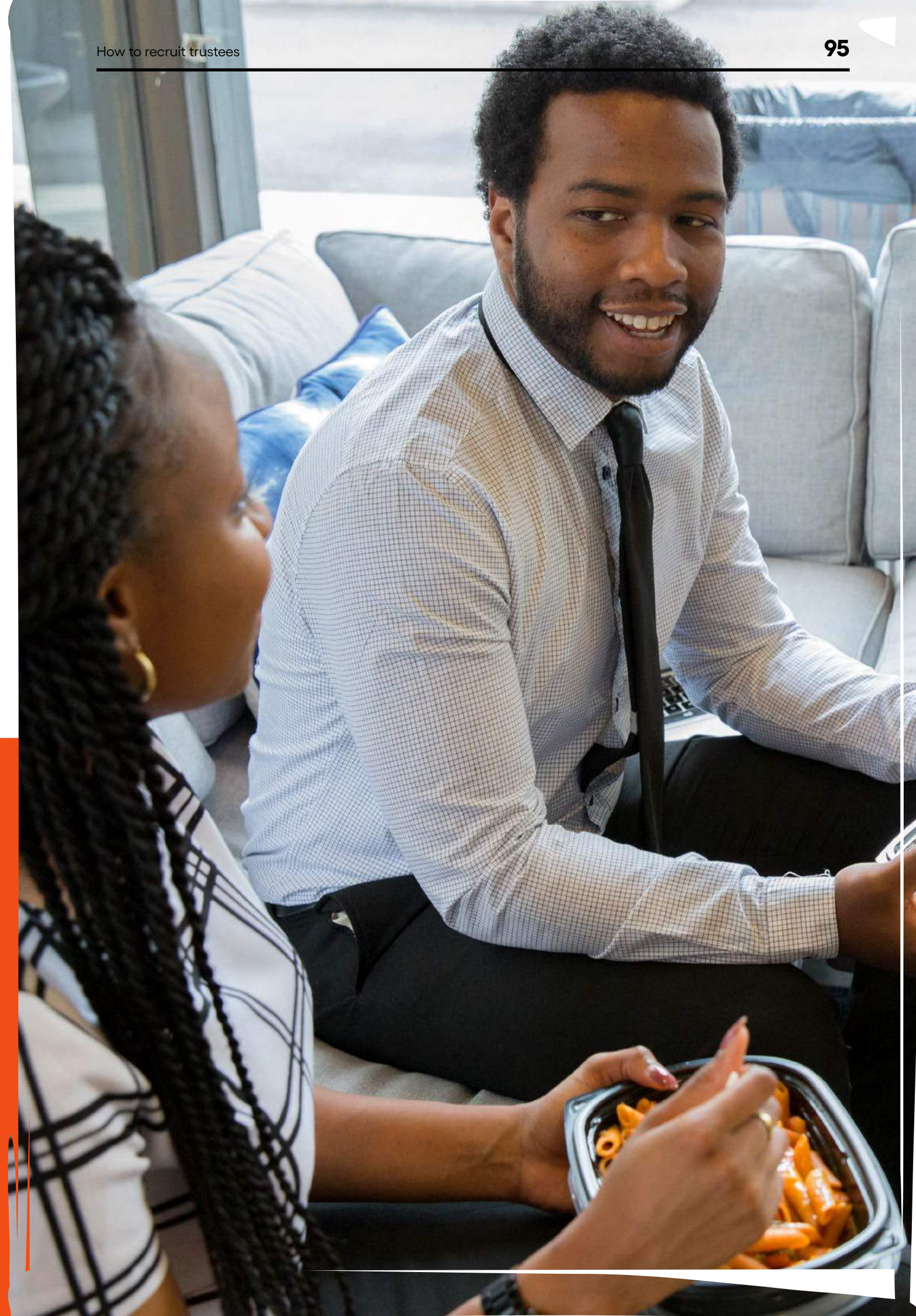
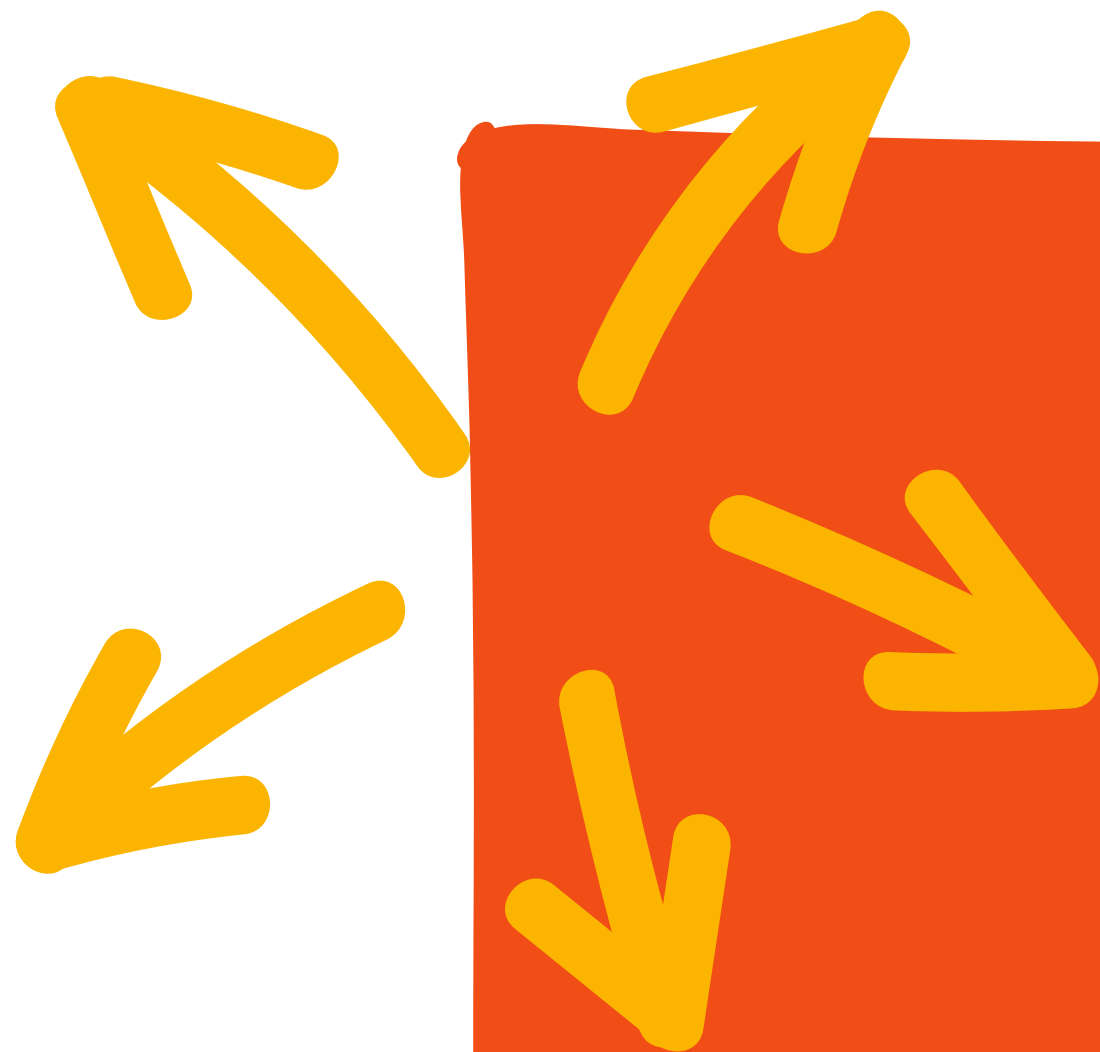
- Document(s) setting out the roles and responsibilities of the board (which may include a chair, treasurer, etc., as well as trustees) and job description of the CEO (if applicable)
- Board terms of reference or code of conduct
- Business plan
- Organisation chart, including different committees and governance structure, as well as the operational or management structure
- Terms of reference for any committees
- Scheme of delegation and/or financial thresholds for expenditure



# CONTINUOUS LEARNING AND SUPPORT

Getting on Board runs the Trustee Learning Programme, an ever-expanding regular programme of online trustee learning for trustees.

The sessions cover aspects of trusteeship including finance for trustees, inclusion and board relations. They are aimed at all trustees, not just newly appointed ones, with the aim being that all trustees continually seek to improve their learning to model best practice, and to strive for excellence to benefit their charities and society beyond.





# FURTHER GUIDANCE

- Charity Commission guidance (England and Wales) – [CC3: The Essential Trustee](#)
- OSCR guidance (Scotland) – [Trustee Duties](#)
- Charity Commission for Northern Ireland guidance (Northern Ireland) – [Running Your Charity guidance](#)
- [The Charity Governance Code](#)

You can download examples of induction packs from our [resource page](#).



Young Citizens charity

# OTHER PRACTICALITIES

## On a practical level, ensure you:

- Give new trustees access to any board portal or shared drives (and that former trustees are removed), so they can access documents electronically and/or obtain the latest versions of policy and other documents.
- Share contact details for key individuals, including other trustees and the CEO.
- Ask new trustees to complete a register of interests, so it is easier to manage potential or actual conflicts of interest or loyalty. All trustees should be asked to update this annually.
- Give the name and contact details of the person who deals with the logistics of trustee meetings.
- Provide a copy of the expenses policy and claim form.
- Provide details of upcoming events and important dates (e.g. board meetings, AGM), including the date, time and location.
- Make your new trustee(s) aware of any trustee indemnity insurance policy in place.
- Keep all of your trustee recruitment and induction resources in one place, so they're easily accessible.



# ONGOING TRUSTEE DEVELOPMENT

Once your new trustee(s) have completed their initial induction, you may want to provide them with further training, which could be offered to all trustees on an ongoing basis. For example:

- ICAEW offers a six-module course to individuals who join its Volunteering Community (open to anyone); the Society of Trust and Estate Practitioners (STEP) has also developed an online course called The Informed Trustee for charity trustees.
- Umbrella bodies and sector organisations provide a range of guidance and training.
- Many charity law firms and CVSs provide free or low-cost seminars on key topics such as the role and legal duties of charity trustees.
- Other conferences and training events are available (at cost), such as NCVO trustee training and Trustee Exchange.
- Your charity could also arrange a bespoke trustee development day that is tailored to your charity and facilitated by an external governance adviser.



# TRUSTEE INDUCTIONS: WHAT TO INCLUDE

The induction process should include:

- Time with the chair either face to face or by phone or video call. This gives the new trustee(s) the chance to ask any questions they didn't feel able to raise before their appointment, and to confirm mutual expectations and initial thoughts about what they think they can offer. For the chair, it is an opportunity to provide a briefing ahead of the first board meeting about relevant context to discussions.
- An explanation of the organisation's history, work, current priorities and challenges, acronyms, key stakeholders and external environment. Some of this information might already have come up during the recruitment campaign, but it is worthwhile to provide a recap as your new trustee(s) might not have taken it all in. This also helps put your new trustee(s) on a level playing field with other trustees in terms of their knowledge, so they can hit the ground running.





- A briefing meeting with key senior staff and/or volunteers. For example, executive staff might provide a verbal briefing on current priorities for their department, performance against strategic objectives, and an overall picture of how the charity operates in practice.
- An opportunity for the new trustee(s) to meet with the full board. This will include their first trustee meeting – at which it might be helpful to have name cards if it is face to face. But it can also include informal or social opportunities, such as a meal for the board, or coffee or lunch before a meeting. Give new trustees a steer about what to expect, as this won't be obvious to everyone (and can vary from one charity to another).
- A chance to experience the organisation's activities and meet with those the charity supports. If this is possible, providing your new trustee(s) with an opportunity to visit some of your services or meet with those it has helped can help to put theory into practice. It can also ignite a greater passion and enthusiasm for what the charity is trying to achieve.
- A follow-up call with the chair to capture first impressions of the new trustee(s). This may be after their first board meeting or a couple of months into the role. It can be helpful in evaluating the recruitment and induction process, as well as their reflections on how to develop the charity's governance. It also acts as a follow-up to your initial conversation about how your new trustees' skills might be used to help the charity and any ideas they have for future developments, contacts or partners having learnt more about the charity.



First Give charity

09

## FURTHER HELP FROM GETTING ON BOARD

We hope this guidance gives you lots of practical tips on finding new trustees and encourages your board to try out something new for your next trustee recruitment campaign.

We'd suggest you evaluate your campaign once your new trustees are in post, to reflect on what has worked well and capture whether there is anything you would do differently next time. This could include input from your new trustee(s), as well as the rest of the board and others involved in the recruitment campaign. Having done it once, open trustee recruitment should be easier the next time round!

There is plenty of further help available. Getting on Board's ever-expanding Trustee Learning Programme includes the one-hour webinars Help! We Need New Trustees and How to Diversify your Charity's Board, both of which are full of practical steps and advice that is regularly updated to reflect changes to legislation and current thinking.

Getting on Board also offers Transform, a flagship six-week programme that equips your charity with the skills to set up an open recruitment strategy. By the end of the programme, participating charities will have implemented a campaign to recruit trustees to their board, and developed procedures and policies to ensure succession planning, diversity and inclusion are all considered.

**“There is plenty of further help available. Getting on Board's ever-expanding programme of webinars includes the one-hour webinars Help!”**

**Help! We need new trustees**



## OTHER GETTING ON BOARD GUIDES

Getting on Board has two other free guides available.



How to Diversify your Charity's Board lays out the clear and compelling rationale for why diversity is crucial to the success of a charity's board and the sector as a whole, and the fundamental role inclusion plays in this.

There are also case studies, practical exercises, free templates and thought leadership pieces throughout the guide that will help you develop a recruitment strategy that meets your needs.



How to Become a Charity Trustee is aimed at aspiring trustees and is a useful tool to encourage those brilliant members of your community who may not have considered trusteeship. You can also signpost this to applicants as part of your own recruitment campaign.



# WHERE THE EXPERTISE IN THIS GUIDE COMES FROM

**Getting on Board has been working on trustee recruitment since 2004. Thousands of charities have used our guidance, templates and training to support their trustee recruitment.**

In 2017, Getting on Board launched the Trustee Recruitment Pathways programme to address the ongoing lack of open trustee recruitment, which our research<sup>2</sup> showed was significantly hampering the effectiveness of charities. This was combined with the Taken on Trust research commissioned by the Charity Commission for England and Wales in the same year, which showed that trustees tended to be drawn from limited sectors of society.<sup>3</sup> We felt that people with vital skills and knowledge could make huge contributions as trustees, supporting the committed volunteers already serving as trustees, if only they knew that their input was needed.

The Trustee Recruitment Pathways programme confirmed:

- There is a direct correlation between good open trustee recruitment and success in finding the skills, knowledge and experience a charity needs.
- Open trustee recruitment is more likely to attract people who don't already know they want to become a trustee and/or groups of people that are under-represented on trustee boards.

With the learning from the Trustee Recruitment Pathways programme, and the help of an expert advisory group, this guide was produced to give charities practical tools to recruit the trustees they need.

Trustee Recruitment Pathways evolved into Getting on Board's Transform programme, which supports charities in radically improving their trustee recruitment processes, board culture and inclusion processes. We are updating the guide with current learning on trustee recruitment – we hope you find it useful.

2. Getting on Board research report: The Looming Crisis in Charity Trustee Recruitment.

3. Research commissioned and published by the Charity Commission: Taken on Trust – The Awareness and Effectiveness of Charity Trustees in England and Wales.

## TRUSTEE TRUTHS



### The board was wary of tokenistic appointments

We've appointed three new trustees from one round of open recruitment as a result of Transform.

The new trustees all have the skills, knowledge and experience we wanted. One of them is 21 and passionate about their community. They started a non-profit during the pandemic. Finding young trustees had been a big challenge previously.

Our key takeaway from the programme was that it very much gave us the understanding that encouraging people from different backgrounds isn't enough.

The board was very wary of tokenistic appointments, so we examined the intersectionality between skill and experience. Transform helped us target our efforts accordingly.



**Caroline Taylor**  
CEO of Essex Community Foundation



# OUTCOMES OF TRUSTEE RECRUITMENT PATHWAYS

Before the Trustee Recruitment Pathways programme, **80%** of 30 participating charities struggled to attract trustees.

**74%** successfully recruited new trustees during the programme.

**65%** of participating charities felt their board was more diverse now.

**43%** of participating charities before the programme felt partly or well equipped to deal with the challenges their charity was facing. This had increased to **85%** by the end of the programme.

**55** trustees were recruited. This included individuals who had not previously considered becoming a trustee.

# OUTCOMES OF THE TRANSFORM PROGRAMME

**100%** of participating charities report their boards are now more diverse as a result of the programme.

The average number of trustees appointed by each organisation is **3.75** (if you can appoint a part trustee!). This is important because we know that trustees who are different from the rest of the board have a better chance of contributing and staying if they are not the only new recruit.

**100%** feel that their organisation is now better equipped to deal with the challenges facing it over the next 3-5 years.



Find out more about the [Transform programme](#).



# FINAL WORD

Each charity out there has been set up to meet a need, to make the world a better place, to preserve something beautiful, to enrich quality of life.

They can only do that to their best if they have a leadership with the rich mix of skills, experience and backgrounds they need for this stage in their journey, and who are supported and equipped to serve the charity well.

Your new trustees are waiting to be found. Where are you going to start?

# TRUSTEE TRUTHS



We feel more prepared to face the future

“We now have a board with a wide range of skills and feel far more prepared to face the future. This has coincided with us reviewing our strategic plan and our new board members have had a full role in that. We all have a shared vision and have the skills within our board, staff and volunteer team to put it into action.”

Board of trustees  
Well Women Centre

## Our funders:



## Proudly sponsored by:



## Our advisory group:



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for Getting on Board

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