

Trustee Recruitment Masterclass

Penny Wilson, CEO,
Getting on Board

WELCOME AND INTRODUCTIONS

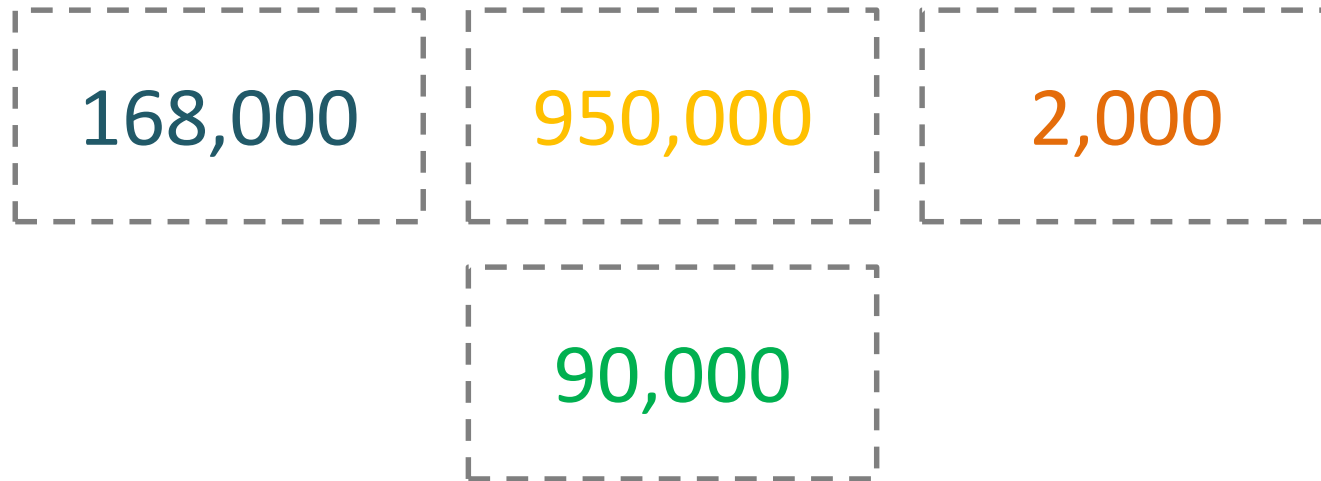


WHAT WE WILL COVER TODAY

1. The trustee landscape
2. What do you need on your board?
3. Your advert
4. Getting your advert out there
5. The recruitment process

The trustee landscape

Trustee Landscape





74%

of charities find it
difficult to recruit
trustees

BENEFITS TO TRUSTEES

96%

Of trustees say
they've learned
new skills

73%

Say it has boosted
their confidence

84%

Said being a
trustee made
them happier



22%

Got a promotion
because of it!

86%

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

38%

Had new
leadership
aspirations as a
result

74%

Of women said it
improved their
confidence

So, why are there still so many trustee vacancies?

GETTING ON BOARD RESEARCH 2017

**Over
90%**

of charities recruit
most trustees through
word-of-mouth and
existing networks

IS THIS THE IDEAL BOARD?



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OR THIS?



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WHO IS MISSING FROM CHARITY BOARDS?

- Those with ‘professional’ skills: charities state that they struggle in particular to recruit trustees with finance, PR, fundraising, legal, digital, HR and marketing skills.
- Service-users/those with “lived experience” of an issue: 59% of charities said that their boards were not representative of the communities they serve.
- Young people: the average age of a trustee is 57 and only 0.5% of trustees are 18-24, despite making up 12% of the population. Two thirds of charity trustees are over 50 years old.

WHO ELSE IS MISSING FROM CHARITY BOARDS?

- Women: Charity Commission research November 2017 found that men: women is 2:1.
- Other minority groups: anecdotally, members of BAME communities, disabled people and other minorities are likely to be under-represented. For example, 6% of trustees are from BAME backgrounds. This compares to 8% of FTSE 100 company directors.

THE RESULT OF CHARITIES NOT HAVING THE TRUSTEES THEY NEED

14%

of charities feel very well
equipped to meet the
compliance, strategic and
development needs of the
charity over the next 3 years

What do you need on your
board?

THE 'IDEAL' BOARD?



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SKILLS AUDITS



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FREE BOARD SKILLS AUDIT TOOLS

<https://reachskills.org.uk/knowledge-centre/support-boards/recruiting-and-retaining-trustee/how-do-i-do-skills-audit>

<https://prospect-us.co.uk/media/84991/board-skills-audit-v1.doc>

<http://www.gettingonboard.org/useful-documents-for-charities>

What skills, experience,
knowledge, networks do your
current trustees have?

YOUR CURRENT TRUSTEES

Name	Professional experience	Personal experience	Networks and knowledge
Bob Smith	Family therapist	Disabled child	Local council and voluntary sector
Carol King	Accountant	Sports coach	Chamber of commerce

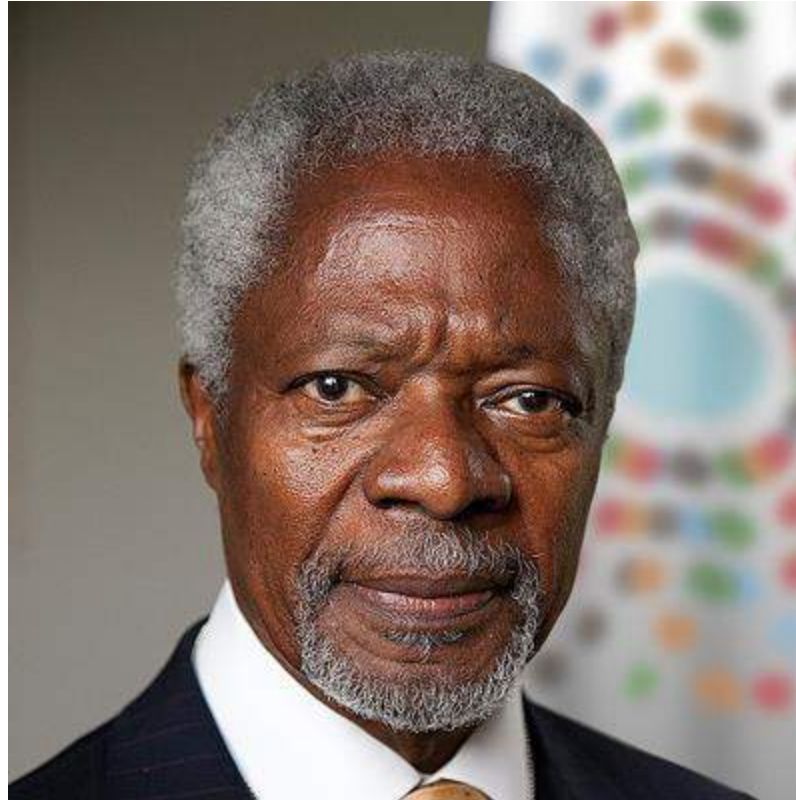
What challenges is your charity likely to face over the next 5 years?

WHAT/WHO IS MISSING FROM YOUR BOARD

- Do your trustees have the right skills, knowledge, experience, backgrounds to tackle these challenges?
- If not, what's missing?

What/who is your board missing?

DIPLOMACY



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Your advert



Join Filthy Lucre As A Trustee

Filthy Lucre is looking for new trustees to sit on its board. We are becoming a charity, a move that is important for us financially and part of the professionalising of our organisation. We need talented trustees who are able to hold us to account on our musical and ethical as well as our financial and legal obligations.

The role would not be an especially demanding one: we are a small organisation and only undertake a few events each year. Other than attendance of board meetings, there are few fixed requirements for our trustees. You would not, for example, be financially liable for the organisation.

We already have two trustees committed to the project, and would have one representative of the founders (Joe Bates, William Cole, and Anthony Friend) on the board. We are especially interested in board members who can help us with our financial and legal obligations. That said, please do get in touch regardless of your background or experience – if you are interested in our project and can help it move forwards, then we want to hear from you.

If you are interested, please contact Joe Bates at joe@filthyfilthylucre.co.uk.

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Appointment of Trustee

The Trustees of Girton Town Charity wish to be representative of the residents of the Village and we would welcome a new member of any age, sex, race or belief who shares an interest in the promotion of the Charity and its purposes.

As a Trustee you must be prepared to take an active and 'hands-on' part in the running of the Charity which will involve working on specific allocated responsibilities.

We have a monthly evening meeting to discuss the routine business of the Charity and new strategies are developed at an annual all-day meeting.

If you are interested in the position, please contact the Chairman or any other Trustee to talk about what is involved in carrying out the work of this vibrant charity.

Written applications to be addressed to the Chairman at 22 High Street, Girton, CB3 0PU.
Closing date 19th November 2017.

Trustee

Lloyd's Charities Trust

📍 Home-based

London, Greater London

£ Not salaried - Voluntary

🕒 Voluntary

EMPOWER PEOPLE WITH US.



We are recruiting to a number of voluntary positions to join our Board of Trustees.

We are a successful **relationships charity** with a vision for society where people enjoy good emotional well-being and personal resilience, supported by positive relationships in all areas of their life.

We do this through the provision of **counselling** for children, young people, adult individuals, couples and families, a **domestic abuse service** with integrated support for perpetrators, victims and children, family **mediation**, **parenting courses** and **community interventions**.

Whether you're an experienced Trustee or wanting to take your first step at Board level, we want to hear from you.

Our new Trustees will have skills in one or more of the following areas:



As a Trustee you will have:

- Induction, training & reimbursable expenses
- Opportunities to make strategic decisions & develop new skills
- Opportunities to network with senior professionals
- Influence to shape innovative projects
- The chance to improve health & wellbeing of people & communities

The expected time commitment is six Trustee meetings per year (meetings are held in Manchester, on Wednesdays between 6 - 8pm), one full day strategy day and some ad-hoc committee work

Deadline for applications: 3rd September 2018
Interviews: w/c 10th and 17th September 2018
For an application pack: please contact recruitment@talklistenchange.org.uk

For an informal chat, contact our Chief Executive, Michelle Hill at: michellehill@talklistenchange.org.uk.

talklistenchange.org.uk

[@TLC_Charity](https://twitter.com/TLC_Charity)

[TLC: Talk, Listen, Change](https://www.linkedin.com/company/tlc-talk-listen-change)

[/TalkListenChange](https://www.facebook.com/TalkListenChange)

Getting on Board

What works **well**?

Any room for **improvement**?

What **type of person** do you think it would attract?

WHAT TO INCLUDE IN YOUR ADVERT

- What your charity does
- What skills and experience you're looking for *and why*
- What a trustee does
- What the commitment is
- Any benefits – out of pocket expenses, training
- Where the meetings are held
- How to find out more information
- How to apply
- Closing (and interview) dates

What is a trustee?

“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.”

(The Charity Commission)

POSSIBLE ADVERT WORDING

“Previous board/trustee experience is not necessary and we welcome applications from all ages and backgrounds.”

YOUR ADVERT

What will you include?

Have a go at writing your ad



INFORMATION 'PACK'

- The role – skills, knowledge etc requirements
- Trusteeship in general
- The charity
- The commitment (time, place)
- Interview and appointment process
- Examples – Google 'trustee recruitment pack' to find a mix of different examples, plus examples on Getting on Board website

Common concerns you might want to tackle:

- What is trusteeship?
- Time commitment
- Trusteeship is not a 'closed shop'
- Trusteeship isn't just for older professionals
- Liability



...or **ideas** to share?



Getting your advert out there

General



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Trustee listings websites

1. Do-it/Small Charities Coalition: <https://do-it.org/channels/trustee-finder> (free)
2. Reach: <https://reachvolunteering.org.uk/charities-non-profits/find-trustee> (free)
3. NCVO Trustee Bank: <https://www.ncvo.org.uk/practical-support/information/governance/trustee-bank/vacancy-search> (free to NCVO members)
4. The Big Give: <https://secure.thebiggive.org.uk/trustees> (free)
5. Women on Boards: <https://www.womenonboards.net/en-GB/Home> (free)

Other places to advertise for trustees

1. Getting on Board:

<http://www.gettingonboard.org/charities/> (free, not a listings website)

2. Team London: <https://volunteerteam.london.gov.uk/> (free)

3. The Fore: <https://www.thefore.org/charities/> (free)

4. Charity job: <https://www.charityjob.co.uk/> (free)

5. The Guardian jobs: <https://jobs.theguardian.com> (charge)

6. Third sector: <https://jobs.thirdsector.co.uk> (charge)

Other places to advertise for trustees

1. Your own website, social media, newsletter, premises
2. Local papers, newsletters, e-magazines, neighbourhood magazines
3. Posters in libraries, supermarkets, community centres
4. Volunteer Centre / CVS / membership bodies
5. Twitter, Facebook, Linked In etc

Targeted



Where will you find trustees with the skills you need?

1. Workplaces/large local employers
2. Business parks
3. Business networks/membership bodies
4. Professional associations

Accountants - <http://www.icaewvolunteers.com/>

Treasurers - <http://www.honorarytreasurers.org.uk/Vacancies1.html>

Lawyers - <https://www.barprobono.org.uk/>

HR - <https://peoplemanagement.haymarketrecruitment.com/register/>

5. Publications, websites, online networks

Case study



Gatekeepers

Dear Gillian

I am a trustee of Cambridge Student Community Action. We run several projects for local children, families and adults and take referrals from colleagues at the County among others. We are currently looking for new voluntary trustees and one of the areas of expertise we would like on the board is social work/social care. I wonder if you could assist us by circulating the attached advert to any relevant networks or colleagues please? As well as being extremely rewarding and impactful, being a trustee is also a great personal and professional development opportunity.

Best wishes

Penny Wilson

Advertising for your trustees

How will you target your advert at trustees with the skills/experience you need?

Where will you advertise for your new trustees?

Shortlisting, interviewing,
observing the board,
appointment, induction

Before you recruit

- Check your governing document
- How must your trustees be appointed?
- Don't forget any third parties who may have nominations rights
- Consider for eg. Members and ensure you follow the proper process.
- Take members with you, particularly if bringing in 'outside' trustees

SHORTLISTING

- Decide who is going to shortlist
- You could anonymise applications to minimise 'unconscious bias'.
- Make sure you are clear on the criteria you are assessing – essential vs desirable
- Set scores, eg. out of 5 for match to each competency you are looking for.
- Useful tips: <https://www.tpp.co.uk/employers/recruitment-advice/general-recruitment/how-to-shortlist-cvs-quickly-and-effectively>

INTERVIEWING

- Think accessibility
- Who to have on your interview panel
- Use set questions for all candidates – can delve deeper if need to.
- Ask for specific examples to demonstrate experience.
- Remember to inform unsuccessful candidates.

OBSERVING THE BOARD

- Many charities invite potential trustees to observe a board meeting before both sides commit.
- How will you manage this (confidentiality, papers, appointment)?

APPOINTMENT AND REFERENCES

- Take up references
- Ensure DBS checks if needed.
- Ask all new trustees to complete the Charity Commission trustee declaration:
<https://www.gov.uk/government/publications/confirmation-of-charity-trustee-eligibility>
- Formal appointment

TIPS ON WHAT TO INCLUDE IN TRUSTEE INDUCTIONS

- Meet with board
- Time with Chair
- Meet with key exec staff
- Experience organisation's activities
- Explain organisation's history, work, current priorities/challenges, acronyms (!), key stakeholders, external environment
- Document pack



...or **ideas** to share?



GET YOUR TRUSTEESHIP HERE!



info@gettingonboard.org

<http://www.gettingonboard.org/useful-documents-for-charities>

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