

Trustee Recruitment Workshop

Team London

Monday 16th July 2018

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 process after advertising

WORKSHOP OBJECTIVES

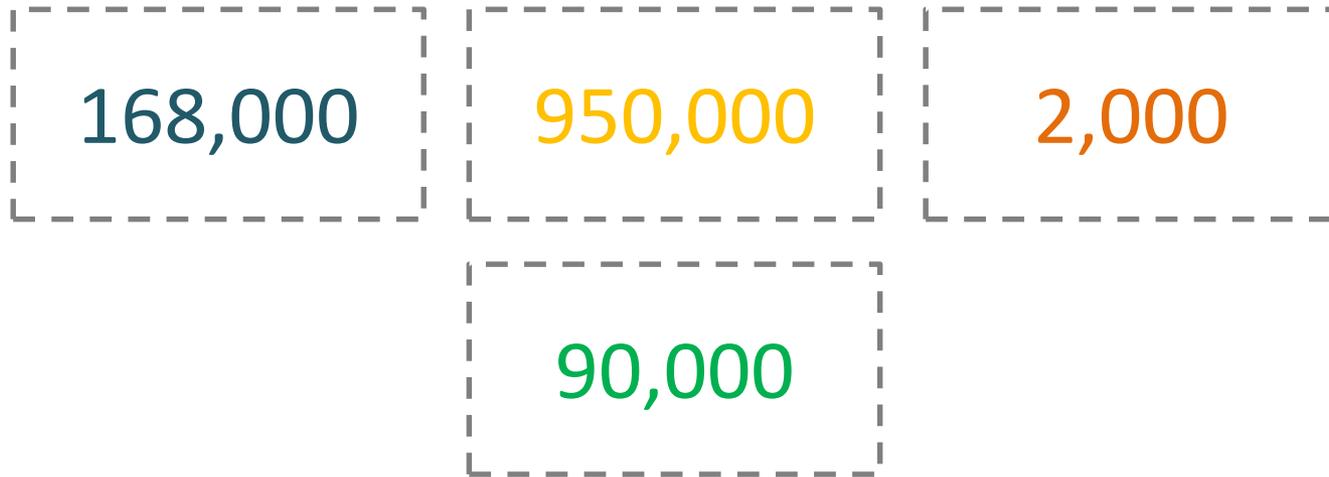
At the end of the day, you should have:

- A clearer understanding of who you need on your board (skills, knowledge, experience)
- A draft advert to attract potential trustees
- A list of ways your charity will advertise for trustees
- A plan for the recruitment and induction process

What would you like
to get out of today?

The trustee landscape

Trustee Landscape



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

- Only 10% of vacancies are ever advertised. (Trustees Unlimited)
- Over 90% of charities recruit most trustees through word-of-mouth and existing networks.
- 54% of charities advertise their trustee vacancies on their *own* website.
- 15% advertise their vacancies in the media.

IS THIS THE IDEAL BOARD?



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

THE 'IDEAL' BOARD?



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What do you need on your board?

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

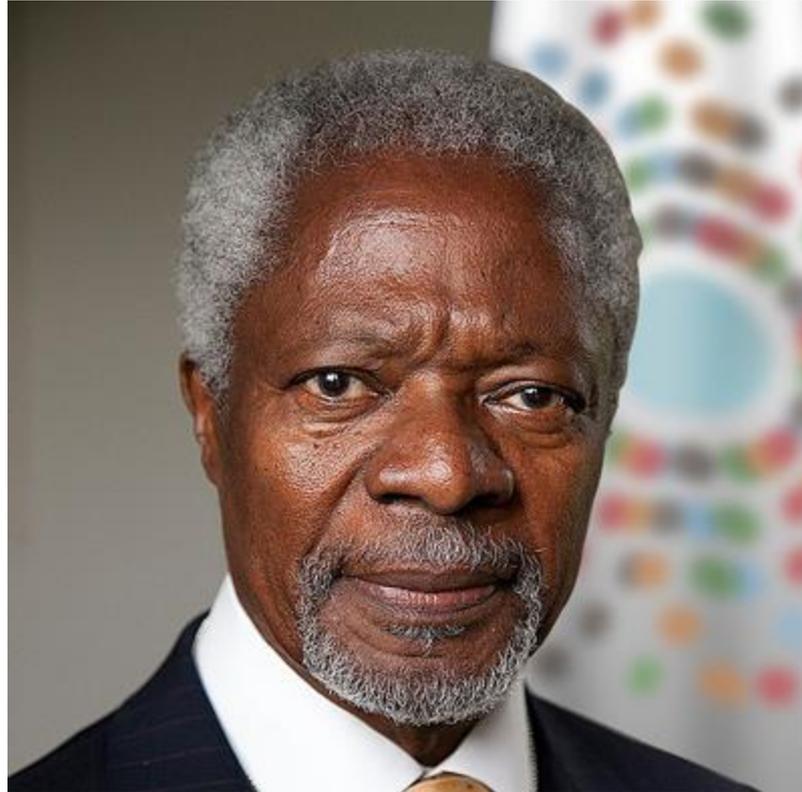
What challenges is your charity likely to face over the next 5 years?

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

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.

Help local museums prepare for the future

Cambridgeshire museums are looking for dynamic and motivated people to serve on their Boards in non-Executive voluntary capacities

- Museum of Cambridge
- Ely Museum
- Burwell Museum
- Stained Glass Museum

Expertise in the following areas is required:
Finance, Marketing, Education, Fundraising, HR, Museum Sector

All museums are Accredited, independent charitable organisations

For Trustee recruitment packs and further information:

www.volunteercambs.org/trustees

Or contact Gordon Chancellor, Museums Partnership Officer for
Cambridgeshire:

E: gordon.chancellor@cambridgeshire.gov.uk

T: 0774 720 55 75

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.

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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

“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)

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





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Information pack / further information

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

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

ROLE DESCRIPTIONS/PERSON SPECIFICATION

- Role description templates - <https://reachvolunteering.org.uk/knowledge-centre/support-boards/recruiting-and-retaining-trustee/model-role-descriptions>

PERSON SPECIFICATION - GENERAL

Each trustee must have:

- *a commitment to the mission of NCVO*
- *a willingness to meet the minimum time requirement*
- *integrity*
- *strategic vision*
- *good, independent judgement*
- *an ability to think creatively*
- *a willingness to speak their mind*
- *an understanding and acceptance of the legal duties, responsibilities and liabilities of trusteeship*
- *an ability to work effectively as a member of a team and to take decisions for the good of NCVO.*

https://www.ncvo.org.uk/images/images/about_us/trustees/Trustee_Description_of_Role.pdf

PERSON SPECIFICATION - SPECIFIC

- *Successful track record in digital marketing*
- *Experience of working at a senior management / leadership level.*
- *Demonstrable and practical experience of delivering transformational change to business technologies and processes, to deliver cost savings and service improvements for customers.*
- *Experience of current agile project management practices, open source, cloud platforms and digital services.*

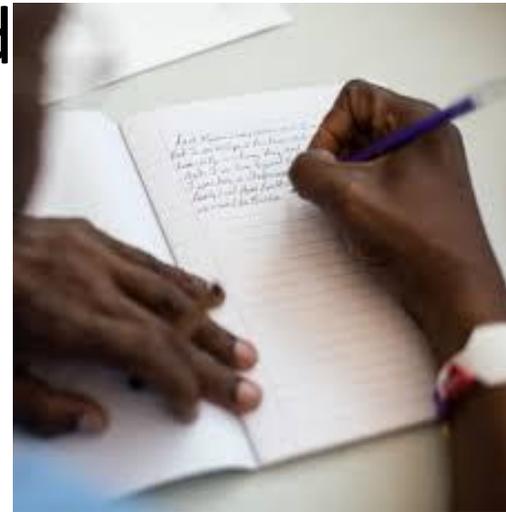
(Digital trustee, adapted from REACH)

Take stock

Go back to your advert.

Anything you'd change...add...tailor?

What do you want in your advert and what should go in your info pack?





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



Getting your advert out there

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

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

Other places to advertise for trustees

1. Team London: <https://volunteerteam.london.gov.uk/> (free)
2. The Fore: <https://www.thefore.org/charities/> (free)
3. Charity job: <https://www.charityjob.co.uk/> (free)
4. The Guardian jobs: <https://jobs.theguardian.com> (charge)
5. 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

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

Getting  
on Board 

Wanted: a trustee with marketing experience



Getting  
on Board 

Wanted: a trustee with business devt/social enterprise experience



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Wanted: a trustee with experience of homelessness



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Advertising for your trustees

Group exercise:

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

Where will you advertise for your new trustees?

TAKE STOCK

Go back to your advert and targeting plan.

Anything you'd change...add...tailor?

Notes/reminders to self?



Shortlisting, interviewing,
observing the board,
appointment, induction

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

INDUCTING NEW TRUSTEES

- Don't fall at the final hurdle.
- Make trusteeship of your charity a good experience – start as you mean to go on.
- Tips on what to include.
- Often overlooked part of the process
- Don't squander the great impression you've created!

TIPS ON WHAT TO INCLUDE

- 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

Tips on what to include

Documents

- Board terms of reference, roles and responsibilities, board code of conduct
- Strategy
- Governing documents
- Recent minutes
- Financial information / annual report and accounts
- Signpost Charity Commission guidance



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



GET YOUR TRUSTEESHIP HERE!



penny@gettingonboard.org

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

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