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| TRUSTEE INDUCTION |
|  |  |  |
| Guidance & Templates |

# How to welcome your new trustee

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| **What?**The purpose of this activity is to decide how to welcome your new trustee, what information to provide and how.**Why?**With some planning, there are a few relatively easy things you can put in place to make sure your new trustee feels welcome so they settle into the role quickly.**How?**Someone (it could be the whole board or just one trustee) should take a look at the welcome process checklist. The left hand column provides information about what you would want to tell your new trustees so that they settle into the role quickly.The right-hand column is for you to think about how to provide that information. We have given you some ideas as a starting point but you should add your own. (Optional) At a board meeting, have a discussion about what it was like to join the board. What would have made it easier to feel settled and get to grips with the role? This could be things to read, or people you would have liked to meet or activities you would have liked to have seen. Someone should take responsibility for making a note of these to feed into the next stage. |

# Welcome process checklist

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| **What should they know?** | **How will we provide this?** |
| About the role of a trustee | * Role descriptionCode of conduct
* Information from the Charity Commissioneg CC3 The Essential Trustee.
* Copy of the Charity Governance Code
* A copy of the expenses claim form and information on what can and cannot be claimed
 |
| Core documents | * A copy of the governing document
* Most recent annual report and accounts
* Strategic and business plans
* Key policies (eg health and safety, safeguarding, social media)
* Report of annual risk audit
* Document setting out levels of the board’s delegated authority, including financial delegation and controls
 |
| Who the trustees and honorary officers (if applicable) are and what they do (Not just governance roles, but others such as social roles, who books the venue, who to send apologies to, etc) |  |
| How long can trustees serve? |  |

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| **What should they know?** | **How will we provide this?** |
| Frequency, dates and length of meetings and sub-committee meetings | List of meetings |
| Date of next AGM (and other events they have to attend) |  |
| A brief background to the organisation eg history, funders, volunteers, achievements etc. | Set up meeting with chairList of all policiesA copy of the accountsA tour of the venue, including where to get refreshments, toilets etc.Set up meeting with key staff or volunteers (where appropriate) |

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| **What should they know?** | **How will we provide this?** |
| Contact details | Details of how to get in touch with key staff members and other trustees |
| The board’s current priorities | Minutes of recent meetings, including recent AGM |
| Add your own… |  |

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| **What should they know?** | **How will we provide this?** |
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| **What should they know?** | **How will we provide this?** |
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*This example role description was produced for members of TVA. It is meant as a guide and does not constitute HR advice. You should adapt it to meet your specific job duties and job requirements.*

# References & Additional Resources

**References**

[**WCVA**](https://wcva.cymru/)

[**NCVO**](knowhownonprofit.org.uk)

**Additional Resources**

**If you require any further information or support in adopting any of the documentation, please contact a member of TVA on:**

**info@tvawales.org.uk**or telephone **01495 742420**

**For additional resource and information on governance, click here:**

[**https://tvawales.org.uk/startinggroup/**](https://tvawales.org.uk/startinggroup/)

**The Charity Governance Code**

[**https://www.charitygovernncecode.org/en**](https://www.charitygovernncecode.org/en)

**Charity Commission for England and Wales**

CC3 The essential trustee: What you need to know

CC15 Charity reporting and accounting: the essentials

CC11 Trustee expenses and payments

CC14 Charities and investment matters: a guide for trustees

CC19 Charity Reserves: building resilience

CC5C Trustee declaration form

[**www.charity-commission.gov.uk**](http://www.charity-commission.gov.uk)

**Companies House**

**Companieshouse.gov.uk**

**Charities SORP**

[**www.charitiesorp.org**](http://www.charitiesorp.org)

**The Fundraising Regulator**

[**https://www.fundraisingregulator.org.uk**](https://www.fundraisingregulator.org.uk)

**Disclaimer**

The information provided in this sheet is intended for guidance only. It is not a substitute for professional advice and we cannot accept responsibility for loss occasioned as a result of any person acting or refraining from action upon it.