



Trustee Recruitment Process

This excerpt is taken from our Trustee Toolkit Handbook, which is used as an educational aid during Wirral CVS' Trustee Toolkit workshops. Check our website using the contact information on the last page to see if we have an upcoming workshop you can book on to!

Planning the Process

The first step is to plan the recruitment process. This involves reviewing the charity's governing document to understand any specific requirements or limitations regarding trustee appointments. It's also important to define the goals of the recruitment, such as filling specific skill gaps or increasing diversity on the board. Consider using a nominations committee.

Identifying the Gaps & Needs

Conduct a skills audit of the current board to identify any gaps in skills, experience, or diversity. This helps in creating a clear profile of the ideal candidate. It's also useful to consider the future needs of the charity and how new trustees can help meet those needs.

Describing the Role

Develop a detailed role description and person specification using objective criteria. This should include the responsibilities of the trustee, the time commitment required, and the specific skills and experience sought.

It's also helpful to outline the benefits of becoming a trustee, such as the opportunity to make a significant impact and develop new skills. Ensure that role descriptions and person specifications are inclusive and free from bias.

Promoting the Vacancy

Advertise the trustee vacancy widely to reach a diverse pool of candidates. This can include posting on charity job boards, using social media, and reaching out to networks and professional associations. It's important to ensure that the advert is inclusive and encourages applications from underrepresented groups.

Selecting the Trustee

Review applications and shortlist candidates based on how well they meet the role description and person specification. Conduct interviews with shortlisted candidates to assess their suitability. This can include a mix of formal interviews and informal conversations to get a sense of their fit with the board's culture.

Completing the Formalities

Once a suitable candidate is identified, complete the necessary formalities. This includes checking eligibility, obtaining references, and ensuring the candidate understands their legal responsibilities as a trustee. It's also important to formally appoint the trustee according to the charity's governing document. Make sure that members are able to play an informed role in the election process.

Inducting the Trustee

Provide a comprehensive induction for the new trustee. This should include an introduction to the charity's work, meetings with key staff and other trustees, and training on their roles and responsibilities. A well-structured and resourced induction helps new trustees to quickly become effective members of the board.

Stepping Down

It's crucial for trustees to step down from their roles in a timely fashion to bring fresh perspectives and innovation to the board, preventing stagnation and encouraging dynamic governance. Regular turnover helps avoid burnout among trustees, maintaining their enthusiasm and performance. It also supports effective succession planning, ensuring a smooth transition of responsibilities and preparing future leaders. Adhering to term limits promotes legal and regulatory compliance, while fostering diversity and preventing any single trustee from dominating discussions.

Extra Resources

[Charity trustees: resignation and removal - GOV.UK](#)

[Removing trustees | NCVO](#)

[Recruiting and inducting trustees | NCVO](#)

Need more support?

Wirral CVS is here to help your organisation grow, develop and succeed. Whether you're just starting out or strengthening your foundations, our Development Team can provide one-to-one guidance, training, resources and advice tailored to your needs.

Contact us to book a support session

 **Email:** info@wirralcvs.org.uk

 **Phone:** 0151 433 3371

 **Website:** www.wcvs.org.uk

More resources available at:

www.wcvs.org.uk/support

Including templates, guidance and policy tools across governance, finance, safeguarding, volunteering and more.

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