

Finding New Trustees



If only I had a pound for every time a client asked if we know anyone who wanted to be a trustee... It's a challenge and it seems to be an increasing problem for charities of all sizes. Charities are looking for quality, skilled, engaged trustees, but can't seem to find them or just as frustrating, can sometimes find them but are not able to retain them for as long as they would like.

The Starting Point

The starting point for trustee recruitment is ensuring the current trustees are fully aware of the process and the reasons for requiring new trustees, and that they are fully on board with the plans. Do they know the timetable, the work required, who will be involved, any budget available to support the process, dates of interviews etc.? It is important to ensure that those who are going to be involved can dedicate the time to the process and be available at the right times, so everything runs professionally.

Assuming you have already completed the skills audit and identified the gap you are trying to fill, now is the time to create a detailed profile of the type of person you are looking for.

Someone with 'financial skills' isn't comprehensive enough. You are probably looking for so much more than that. Taking the time to create a detailed set of skills will focus the process but may also attract more of the 'right type' of candidate. Treat the process as though you were recruiting your most senior member of staff. What skills are you looking for which are essential, and which are desirable? These skills should be a mixture of both hard and soft skills, there will be no point in having a person with great finance skills that isn't likely to speak in a meeting and add their opinions into the mix.

You will also need to detail what specifically the role entails, how many board meetings, any sub-committee membership, how many ad hoc meetings and the length and timing of meetings. Will meetings be in person or virtual or a combination of the two. You need to know that the person you recruit can be available when you need them. Someone with the right skills and no time is not the person you need.

The Advert

This can be the most difficult part. Where do you go looking for this time-rich, talented individual that will bring skills, ideas and diversity to your organisation? Firstly, think about the type of person you are trying to attract. Where will they be (either physically or digitally), and how can you capture their attention?

An online digital campaign is a great place to start. Twitter, Facebook, LinkedIn, websites and blogs are excellent platforms to help charities get their message to a wider audience. Extend this by asking existing trustees to help you spread the word by liking, sharing and retweeting your content.

Consider the professional networks of your senior team, who do they know that could spread the word for you? Can the charity's accountants, lawyers and bankers help in anyway? Specialist providers may have dedicated pages on their websites to help clients and even newsletters where they could help you spread the word. They can also help promote the trustee position via social media.

You could also approach the Council for Voluntary Action (CVA's) or similar organisations that match potential trustees to charities. A quick Google search of your area should give you some potential organisations to contact.

Most organisations will be looking to ensure a new appointment enhances diversity. Therefore, it is worth considering advertising within the student community. Students can be time-rich, confident, intelligent and passionate, amongst other things and therefore could be exactly the kind of energy and commitment your organisation needs. It also helps them develop skills that are transferrable to employment.



The Recruitment

Now you have some potential candidates, giving the recruitment process proper gravitas will continue to create the impression that this is a sought-after role. A shortlist now needs to be drawn up and an interview process undertaken. At this stage you will know if the candidate has the skills you need, you now need to assess if they are a good fit for your organisation. By fit, we don't mean a carbon copy of all the other trustees, but a fit with your organisational values, whilst remaining challenging and diverse.

When interviewing, ensure you have a plan of questions that cover both the skills required to be a trustee and those skills you are specifically recruiting for. Ensure you ask what the potential candidate's motivation is for wanting to be a trustee, this could be a crucial make or break question for you. Your next step is to appoint, however, if there is still a question mark over a candidate you could ask them to be an observer for the next planned board meeting to allow both of you to test the water.

The Induction

So now you have someone on board. Firstly, ensure you have gone through the necessary compliance aspect of appointing a trustee. Then your new recruit needs to hit the ground running, take the role seriously, feel empowered from day one to engage and make a difference. The best way to do this is via a thorough induction process.

Induction processes, however, are a whole other article !

Did you know?

The Charity Commission's main guidance is document [CC30 "Finding new trustees"](#). There are 67 million people in the UK; statistics from the ONS tell us that in 2018, 79% of these were 18 or over. That's a very large pool to go fishing for trustees.

So why does it feel so hard to find them? The reality is, if the process is treated with the same enthusiasm as finding new income streams, it may not be so difficult after all, finding the time to achieve the results may well be the hardest part of the process.

What do you Need for Successful Trustee Recruitment?

- **Clearly defined needs**
Exactly what type of expertise would the board benefit from? Define hard skills such as accounting and soft skills such as influencing.
- **Clearly defined role**
What does the role entail, what is the time commitment and what impact could they help make?
- **A strategic plan of where to market the role**
How wide will the net be thrown? A transparent interview process that lays both parties cards on the table as to what they want out of the relationship.
- **A comprehensive and engaging induction process**
A process that gets new trustees up to speed and engaged as early as possible.

How we can help

If you would like assistance undertaking a skills audit of your board, reviewing your trustee's skills and skills gaps, designing a recruitment process, creating a comprehensive induction process or with any other aspect of trustee recruitment and induction we can help.

If you would like to discuss any matter arising from this article please contact MHA on info@mha-uk.com or your usual MHA contact.

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