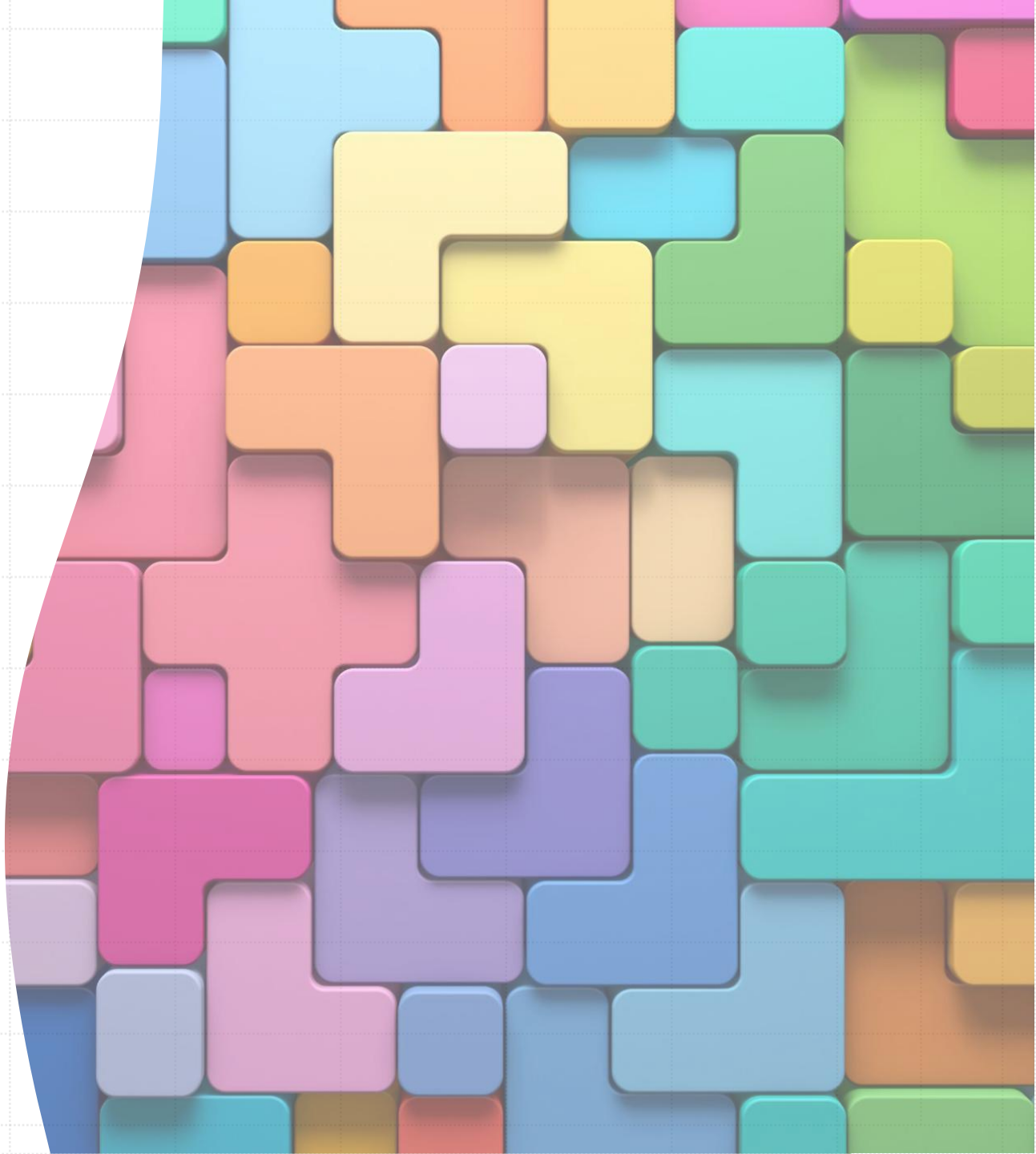
Trustee Recruitment & Retention

Community Libraries Network



The importance of trustees

- Trustees' are ‘the persons having the general control and management of the administration of a charity’.
- A trustee's role in a charity is to be the ‘guardians of purpose’, making sure that all decisions put the needs of the beneficiaries first.
- 90% of trustees are recruited through word of mouth / existing networks.

Trustee responsibilities

Here are also some links to training and guidance which you may find useful:

- Trustee training modules | ICAEW
- The essential trustee: what you need to know, what you need to do - GOV.UK
- Support for trustees | NCVO

What does a ‘perfect’ trustee look like?

Use the whiteboard to add your thoughts

Skills **Experience** **Personality** **Behaviours** **Other**

Examples…

Skills

Business Planning
Governance
Collaboration
Finance
Innovation
Leadership
Legal Skills

Experience

People Management
Embedded in the sector
Charity Links
Prior Board Experience
Volunteer Leadership

Personality

Honest
Forward Thinking
Non-Judgmental
Receptive
Innovative
Good Listener
Emotional Intelligence

Behaviours

Questioning
Flexible
Supportive
Compassionate
Reliable
Critical Friend

Other

Committed to a 2-year term

Skills Audit

- Understand the board's mix of skills & experience
- Identify gaps in the board
- Highlight priorities
- Succession planning – looking ahead

Use the template 'Skills Audit' to access your board.

Example skills audit

Some example scores, challenges/opportunities, together with suggestions for addressing skills gaps, have been provided in this example skills audit	Trustee score Individual trustees' scores compiled together in a matrix 3 = Significant experience and expertise 2 = Some knowledge or experience 1 = Interested in learning more 0 = No knowledge or experience								Challenges and opportunities facing our organisation Listed against the skills, knowledge or experience needed to deal with them.	Gaps in skills, knowledge, experience needed Gaps in skills, knowledge or experience are drawn out here, highlighting areas which should be addressed - either through appointing new trustees and/or developing existing trustees.	Comments
Trustee	Jim	Sue	Ali	Bob	Kim	Ian	Lyn	Total			
Skills, knowledge, experience											
Governance and Leadership											
Chairing	1	2	2	1	0	2	3	11			
Experience in a leadership role	1	2	2	2	1	1	3	12			
Legal duties of trustees and best practice in governance	0	1	1	0	2	2	3	9			
Charity law and compliance	0	1	2	3	0	1	2	9			
Strategic planning	0	1	1	2	1	2	3	10	Greater public scrutiny of governance in charities	Some gaps in understanding.	Suggest training on trustees' duties. Develop induction pack to include this. Recruit a treasurer

Perks of becoming a trustee

- 84% of existing trustees say that being a trustee makes them happier.
- 96% of trustees say they have learnt new skills by being a trustee.
- 73% say it boosts their confidence.
- Becoming a trustee can help to strengthen professional networks.

Creating a Role Description

- Be clear on duties and expectations
- What specific skills and experience are you looking for?
- Which personal skills and qualities would be suitable for the role?
- Be very clear about terms of office e.g. length of term expected and governance responsibilities.
- Be clear about expectations of meetings, additional work and other tasks and duties (projects, fundraises, lease negotiations etc.).

You can download a template trustee job description **here**.

Ways to Recruit…

- Taster days
- Website
- Community noticeboards
- Paid ads & social media
- Local groups and organisations
- Recruitment sites
- CVS orgs
- Community events
- Professional organisations

Trustee Retention

- Trustees need to be nurtured
- Induction process – processes, procedures and meeting the team and other volunteers
- Regular check-ins with trustees
- Engage with trustees – invite them to team meetings, keep informed of business. Avoid ‘Ivory Tower’ syndrome
- Pay expenses and respond to queries promptly
- Offer training regularly e.g. safeguarding, data protection etc. and check that this is reviewed annually
  96% of trustees learn new skills in their role
- Include Trustees in volunteer communications and promotions.
- Always say THANK YOU!

Future Proofing & Succession

- Start with charities governing document
- Create a Governance Diary
- Develop a clear succession plan
- Offer training