



## Recruiting Trustees and Volunteers – Top Ten Tips

The role of trustees is key for all charities. It is more important than ever to select appropriate and productive members of your team. The following steps take you through the process and make suggestions to help.

### **1. Know what you are looking for**

Conduct an audit of your trustee board - the areas of expertise, knowledge and experience of your current trustees – and then identify what you need from new roles and recruit to that brief. Make sure you have a clear vision of what your ideal new trustee will be like and what you expect from them. Think about why someone would be interested in volunteering their services with you. You may be passionate about the charity's cause, but can you create a compelling proposition about the role? E.g., who are they helping and why? What are they going to get from it?

If you are recruiting volunteers the same applies.

It is important nowadays to have information about their background and to source some form of references so as to ensure that you are meeting Charity Commission and other regulations.

### **2. Have a clear decision process**

Be clear about who is making the decision – usually for Trustee positions this is according to your Trust Deed and policies. Informal meetings and interviews should be evidence-based to test the candidates' motivation as well as their skills and experience. Try to get verbal references from others who have worked with the person at the interview stage.

You should also have a process for selecting volunteers, although this may be more informal.

### **3. Organised recruitment process**

Plan the full process. Schedule as much as possible. Make sure all Trustees and any relevant existing volunteers who may work alongside the new recruits are on board, fully briefed and that they understand the process. Allow enough time as it can take several weeks, particularly for Trustee roles.

### **4. Role description**

Outline the roles and responsibilities of being a trustee and whether you expect the person to sit on any sub-committees. For volunteers, you



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should also ensure that you have a clear role description for them including a guide to the amount of time you would like them to give.

Be clear about the expected time commitment and the location and times of meetings. Remember that many people won't understand what trusteeship involves and this can be one of the biggest hurdles.

For volunteers be careful to make it clear that this is what you expect or would like people to do, but keep the language friendly and "soft".

### **5. Prepare a detailed background information pack for candidates**

A pack for potential trustees should include links to the memorandum and articles of association, the financial accounts, biographies of your trustees and the governance structure, including sub committees and other useful information such as about Ride+Stride for Churches, grant giving and any strategic plans.

Whilst you do not need to provide as much for volunteers, it may be an idea to send them something about your work, e.g., back copies of publications or a recent annual statement to explain more about your trust.

### **6. Use your current networks to source trustees**

Get all trustees to think about their current networks and who they know. Make sure everyone knows there is a trustee vacancy available. However, be a bit careful if you are seeking to re-energise or change your trust: your existing networks can often result in recruiting similar people to those already on a board, so if possible, extend the search beyond this.

### **7. Advertise roles**

Write a punchy advert for your website and distribute it via social media. If you produce a newsletter make sure you include the advert. Think about where the people you want to attract would be likely to see your advert – whether it's a local venue, specialist press, a volunteering website or elsewhere.

### **8. Widen the search**

Be creative and think about other places you could advertise. There are resources available for publicising trustee roles free of charge



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### **9. Consider using a specialist recruitment firm if necessary**

If you are struggling after trying other avenues, consider using a professional recruitment firm with a track record of recruiting trustees. They will have a database of executives seeking trustee roles and be able to match candidates to your exact requirements. Some like Trustees Unlimited offer a cost-effective service based on the size of the organisation.

There are many recruitment websites, national and local, that offer advertising services or help to connect charities with new volunteers.

### **10. Induction**

Once you have found your ideal trustee candidate ensure they receive a good induction to help them settle in quickly. This includes clarity about the mission, plans, objectives and minutes of the last few meetings, and importantly, the governing document for the organisation.

It is also important to induct volunteers. Introduce them to any other volunteers they will be working with. Tell them about the culture of the trust and explain how things work.