



Community &
Voluntary Services
cheshire east

Preparation for Trustee Recruitment

1. Review

A **good board** needs the right range of experience and expertise to make informed decisions.

Trustees work as a ***collective*** so recruiting people to add to the spread of skills you already have as a team is a key element.

The right combination of skills and experience will vary for each charity, and will change over time.

Review – Tools/Processes

1. Review your governing documents – clarity of your organisation's values and purpose.
2. Skills Audit – identify gaps for operations & strategy.

Skills Audit

Step 1: Look at the current make up of the Board and ask the following questions:

- Does the Board's current composition represent the community it serves and if not how can these be achieved?
- Is there good diversity?
- If the organisation is national, is the board geographically diverse?
- What other organisations are important to the organisation and can they be represented on the Board?
- What specialist skills and expertise does the organisation need that are not represented in the Board at present?

Step 2: Assessing the skills, expertise and experience of Trustees

Please complete all sections ticking the numbered column which best reflects your level of experience

- 1 qualification/experience at senior level
- 2 some knowledge/experience
- 3 little or no knowledge
- 4 would like information/ peer support / practical experience / training

		1	2	3	4
A	Professional Skills				
1	Human Resources				
2	Accountancy				
4	Audit / risk management				
5	Change Management				
6	Income Generation/Fundraising				
7	Investment				
8	Legal				
9	Volunteer Management				
10	Marketing / Branding / Social Media				
11	Education /Training				
12	Senior Management/Director				
13	Policy/research				
14	Other – please specify				

Step 3: Evaluation and actions

Once the assessment is completed think about:

- Individual training needs
- Determining the skills you should be focusing on in any future searches for new Trustees
- Trustees can be supported to achieve competence in areas where they lack experience
- Finding ways in which Trustees can gain knowledge of different aspects of the organisation

Step 4: Ongoing development and review

This process can be an ongoing piece of work...

- Build it into your Trustee board's annual appraisal process and report
- Enables individuals to identify skills they may have acquired, and highlight 'softer' skills needed for the role

Review – Tools/Processes

1. Review your governing documents – clarity of your organisation's values and purpose.
2. Skills Audit – identify gaps for operations & strategy.
3. Diversity of your board – different perspectives and life experience, diversity audit.
4. Constructive challenging of one another
5. Welcome new board members

2. Plan

Once you have identified the skills and qualities you are looking for in a trustee, spend time on planning and preparation ***before*** you go to advert.

Agree how many Trustees you will need and attributes following your Review.

You may want to include other people from your organisation (not just current Trustees) e.g. create a 'recruitment sub committee'

Plan – Tools/Processes

1. **Create a recruitment timetable** – key dates and people who will sign each element off.
2. **Decide & explain the process** – application forms, engaging with potential applicants, shortlisting process, interview process, appointing process.
3. **Engage potential trustees** – applicants getting to know your organisation, recruitment pack
4. **Identify places to recruit**
5. **Write a trustee role description** – duties & responsibilities, qualities/skills, time commitment

Be prepared to be flexible!

Available resources

- CVS Cheshire East – [Downloadable resources](#)
- Reach Volunteering – [Trustee Recruitment Cycle](#)
- NCVO – [Downloadable Resources](#)
- The Charity Governance Code – [Board Equality, diversity and inclusion](#)
- The Charity Commission – [Finding new trustees \(CC30\)](#)
- Good Governance Institute Article - [Asking the right questions: why constructive challenge is key to board effectiveness.](#)