



Community &
Voluntary Services
cheshire east

Trustee Network
6th July 2022

Trustee Recruitment

Network Agenda

- Introductions
- Trustee Recruitment – ADVERTISE, SHORTLIST, INTERVIEW, APPOINT and EVALUATE
- Guest speaker
- General networking

3. Advertise, Shortlist, Interview & Appoint

- **Advertise** - Create a trustee advert to attract the candidates you want and share it widely
- **Shortlist** - Choose the person who will strengthen your trustee board
- **Interview** - Test the key qualities you are looking for, and to ensure that all candidates have the opportunity to show their full potential
- **Appoint** - Formally appoint your new trustee. Completing relevant eligibility checks, and ensure you appoint someone following rules set out in your governing document.

Advertise

What to put in your advert:

- The purpose of your organisation and why its work matters
- The skills, experience and qualities that you're looking for and why
- Say how you want to increase board diversity
- Explain what a trustee is
- Summarise what the role involves and the time commitment
- Where interested candidates can find out more
- How they can apply

Shortlist

Shortlisting Steps:

1. Use your defined criteria
2. Decide roughly how many people you want to interview
3. Log all applications
4. Remove unsuitable applications
5. Scoring essential and desirable criteria
6. Select your interviewees
7. Give everyone a response

Interview

In preparation for the interview:

- Think about the location, set up and timing – accessibility
- Who will be on the interview panel?
- Decide the interview questions - template
- Brief panel before interview

Interview

The Interview:

- Start by making the candidate feel at ease
- Set the scene - about your organisation, what you're looking for in a trustee
- Ask the interview questions – score as you go along if you can
- Ending the interview – explain next steps, say thank you!

How to say no...

- Having a set criteria and an open recruitment process
- Provide feedback
- Can you offer them another way to be involved in your organisation?
- Say thank you!

Appoint

Essential steps to follow before you can appoint:

- Double check the individual understands the roles & responsibilities of a trustee before they accept the role
- Make [eligibility checks](#) and **check references**
- Check the person meets your criteria of a trustee as stated in your governing document e.g. age requirement, need to be appointed at a board meeting, or elected at an AGM etc.

Once all your eligibility checks are complete, you can appoint your new trustee – **appointment letter**.

Add your new trustee's **details to the Charity Commission**

4. Evaluate

It is important to evaluate your recruitment process while it is still fresh in your mind and will help you adapt and improve for the next time.

Processes considered in this stage:

- Were you clear about what you were looking for?
- Did your advert work?
- Gain feedback from people involved in the process
- Learn from this evaluation and prepare for next time
- Develop a pipeline of trustees
- Trustee succession planning

Were you clear about what you were looking for?

- Evaluate your skills audit and review process of your board.
- Did you gain more diversity on your board?
- Review your advert, role description and recruitment pack

Gain feedback from people involved in the process

- Did you have an independent person on your interview panel?
- People who dropped out of the recruitment process
- Successful candidate

Learning from your evaluation and preparing for next time

- Identify what worked well, what worked less well, and what could be done differently next time
- Write up your evaluation, share with the board

Develop a pipeline of trustees

Future Trustees could be:

- Trustee candidates that showed promise but weren't offered a position when you were recruiting.
- Current volunteers at your charity.
- Individuals involved in charity committees that could one day move on to the board.
- Service users.

Succession planning

- Keep a trustee register
- Set Trustee Term Limits [The Charity Governance Code](#)
- Encouraging trustees to move on
- How to adjust when a trustee leaves

Available resources

- CVS Cheshire East – [Downloadable resources](#)
- NCVO – [Downloadable Resources](#)
- The Charity Governance Code – [Trustee term limits](#)
- The Charity Commission – [Finding new trustees \(CC30\)](#)
- Reach Volunteering – [Trustee Recruitment Cycle](#)
- The Charity Commission - [The essential trustee: what you need to know, what you need to do \(CC3\)](#)
- The Charity Commission – [Trustee Board: People and Skills](#)

Guest Speaker