

Trustee induction

New trustees need to feel welcomed and informed. Giving them some time to learn about the organisation and some key information will help them become a contributing and effective member of the board more quickly. A good induction is often reported as one of the main reasons trustees become engaged with the organisation and stay as a trustee. Poor induction and limited time given to helping trustees learn about the organisation and build their skills is one of the most cited reasons for individuals stepping down prematurely.

A good induction will include the following:

Information pack of key documents

- the governing documents
- latest annual report and accounts
- statement of Trustee liability
- frequency/timings of board meetings and committees
- minutes of previous year's board meetings
- list of current trustees plus short biographies
- organisational structure and senior staff biographies
- background history of the organisation
- the current organisation strategy/operating plans
- applicable policy documents including
 - expenses policy
 - conflict of interest declaration
 - volunteering policy etc
- summary of funding and projects
- outline of main relationships with other organisations
- information about trustee training and development

Examples of organisation marketing literature, business cards, publications the organisation may have issued may also be useful to include as part of the induction pack.

Organisation Induction

New trustees should be invited to the organisations main location office and meet the chief executive and members of the staff (and volunteer team).

An introduction to the organisations main services/activities and visits/introductions to key projects will be a critical element of the induction.



New trustees should be encouraged to meet at least the Chair, Vice Chair and Honorary Treasurer as part of their induction.

Some useful resources:

[Recruit a Trustee - pocket guide](#) (Governance Hub resource summarising the key stages in recruiting trustees successfully)

[Trustee Recruitment Toolkit](#) (Governance Hub resource providing tools to support the trustee recruitment process)

[Induction Planner](#) (Governance Hub Support Resource)

[Induction Pack Checklist](#) (Governance Hub Support Resource)