Understand the nature of the charity:

* Understand the charities purposes and read the governing document.
* Know the charity’s history and past work.
* Meet fellow trustees.
* Read minutes of previous board meetings and be aware of scheduled future meetings.
* Understand the current priorities of the charity and any challenges.
* Read annual reports and accounts.
* Read policies and know where they are obtained.
* Find out how it operates, paying attention to finances (source, amount, savings, contracts)
* Be aware of marketing and branding styles.

Develop an understanding of the role:

* Have details of any upcoming events and important dates e.g., the annual general meeting.
* Have knowledge of the Charity Governance Code.
* Be familiar with the Charity Commission trustee guidance (CC3 The Essential Trustee: what you need to know, what you need to do)
* Know what must be sent to the Charity Commission (charity register details, annual return, accounts)
* Meet with chairperson to discuss board roles and expectations at meetings.
* Know of any trustee liability insurance in place.
* Identify any training that would help develop your skills.

Build links (volunteers, beneficiaries, staff) and understand main relationships.

* If appropriate, visit site and observe projects.
* If possible, participate in the charity’s activities to meet service users.
* Appreciate any satisfaction or survey results.
* Have contact details of key individuals (telephone numbers, emails, web addresses)
* Have a list of stakeholders and any agreed engagement plan with each group.
* Have knowledge of the complaint’s procedure for users and a summary of recent major complaints or incidents.