The aim of an effective induction process is to provide a new trustee with the information they need to become as effective as possible within the shortest feasible time. The assumption is that the induction process will adapt to the needs of the trustee, depending on what they are already aware of and how the content will be delivered.

Suggestion:

Have a buddying system for new or inexperienced trustees to speed up their understanding of the charity’s aims and ways of working and to work out what questions to ask at the next meeting.

Confirm the nature of the charity:

* Share the charity’s current strategy to pursue its objectives.
* Provide an ‘induction pack’ containing a copy of the charity’s key documents (governing document, latest set of annual accounts, copy of minutes from previous meetings)
* Give the latest accounts and if necessary, help the trustee understand the layout and content.
* Provide board approved policies such as safeguarding and conflicts of interest.
* Present a copy of the expenses policy and claim form.

Clarify the new trustee’s role:

* Outline the initial expectations of the new trustee.
* Provide a description of the roles and responsibilities of all trustees and members.
* Enter details of the newly appointed charity trustee in the Public Register of Charities as soon as possible. If the charity is a company, also provide details to the Companies Registration Office.
* Give access to any trustee portal or shared drives so they can access documents electronically such as latest policy documents.
* Brief them ahead of the first meeting so they get an understanding of the context of the topics that will be discussed.
* Provide details of upcoming events and important dates such as the annual general meeting including time and location.
* Ask new trustees to complete a register of interests as this makes it easier to manage potential conflicts (all trustees should update annually)
* Share information about your trustee indemnity insurance policy if you have one.
* Encourage a culture of learning amongst all your trustees as this is intrinsically linked to the effective running of the charity. Discuss training that could help develop existing skills and support them to acquire new skills.

Support the new trustee to build links (volunteers, beneficiaries, staff) and understand main relationships:

* Share contact details of key individuals.
* Present organisational charts – this may show operational/management structure, different committees, scheme of delegation, financial thresholds for expenditure.
* Check in regularly during the first year and ask what support they need to participate fully.