



An Rialáilí
Carthanas

Charities
Regulator

Recruitment and induction of prospective charity trustees

Legal Disclaimer

This document is issued by the Charities Regulator under section 14(1)(i) of the Charities Act 2009, to encourage and facilitate the better administration and management of charitable organisations. It is published as part of a suite of guidance, intended to provide support to charity trustees to meet their legal duties, by putting in place systems, processes and policies which ensure charities are managed in an effective, efficient, accountable and transparent way.

This document is not, nor is it intended to be, a definitive statement of the law and it does not constitute legal advice. Charity trustees are recommended to consult their governing document or to obtain their own independent legal advice where necessary. The Charities Regulator accepts no responsibility or liability for any errors, inaccuracies or omissions in this document.

Recruitment and induction of prospective charity trustees

Introduction

Running a charity well means you need capable charity trustees who work together as an effective team. To ensure that a charity trustee fulfils the role properly, he or she should be able to devote sufficient time and commitment to it. It is also important that there is a good mix of skills, experience and knowledge amongst charity trustees and that these are refreshed on an ongoing basis.

This guidance document outlines what needs to be considered when **recruiting** new charity trustees and how to make sure new charity trustees receive a proper **induction** to the charity.

Recruitment

Before recruiting a new charity trustee, the board should consider what is working well with the current board and what could work better. The board should also be mindful of what skills, experience and knowledge are available to it already from existing charity trustees. This process would normally be led by the Chairperson and should help to identify any competency / skills gaps on the board.

Questions to ask before recruiting a new charity trustee might include:

- In what ways is the board working well at present?
- In what ways is the board not working well?
- What improvements can the board make to how it works, before taking on a new charity trustee?
- What skills, experience, knowledge and qualifications are currently available to the board from existing charity trustees?
- If any of the existing charity trustees are stepping down, what gaps in skills, experience and knowledge will need to be replaced?
- What skills, experience and knowledge are missing and what are the priority areas for the board when looking to appoint a new charity trustee?

Other issues to consider when recruiting new charity trustees include:

- Making sure that the appointment of new charity trustees is in accordance with the requirements of the charity's governing document¹ and charity law².
- The potential to use new or additional methods of searching for new charity trustees in order to draw from a bigger pool of potential trustees. Instead of asking people you already know, consider advertising a vacancy on your charity's website, local notice boards or newsletters, colleges and universities, Boardmatch (www.boardmatch.ie), Volunteer Ireland (www.volunteer.ie) or other forums and social media sites as appropriate.
- Create an informative role description which includes an indication of the time commitment expected from prospective charity trustees and any specific duties attached to the role.
- Make sure prospective charity trustees know how long their appointment is for if there is a maximum time limit.
- Prospective charity trustees should be informed of any board sub-committees and any expectations for charity trustees to serve on at least one. Sub-committees may include finance sub-committees, communications sub-committees, planning sub-committees etc. Charity trustees may have skills and expertise that are useful for particular sub-committees.
- Consider notifying unsuccessful candidates and thanking them for their interest. This is particularly important if the charity has invited expressions of interest through its website, local notice boards or through other mediums.
- Consider whether an unsuccessful candidate may have skills or experience that would enable them to make a valuable contribution to any of the board sub-committees.

Following the appointment of a new charity trustee, the board of trustees must ensure that:

- The details of a newly appointed charity trustee are entered in the Public Register of Charities as soon as possible.
- If the charity is a company, the details of the newly appointed charity trustee are provided to the Companies Registration Office.

1 Where a charity's governing document is impeding charity trustees from attracting new trustees they should consider amending the governing document as appropriate, notifying the Charities Regulator in advance of any proposed changes.

2 A person may cease to be qualified to act as a charity trustee. Grounds for being disqualified from holding the position of a charity trustee are set out in section 55 of the Charities Act 2009. Some charities may also have further grounds on which an individual is prohibited from serving as a charity trustee, which would be outlined in their governing document.

Induction

The induction process for new charity trustees should involve the provision of an induction pack, and meetings with the existing charity trustees, the Chairperson and other key employee(s) or volunteer(s) within the charity.

Provision of induction pack

The newly appointed charity trustee should receive an induction pack which includes key documents relating to the charity and his or her duties as a charity trustee.

These documents should include the following:

- The charity's governing document;
- A list of the current charity trustees and the Chairperson, the charity secretary and their contact details;
- The charity's Code of Conduct for charity trustees;
- The annual report and accounts for the past two years;
- The minutes of recent board meetings;
- Any other key documents.

See '[Induction Pack Checklist](#)' for other key documents that could be included in the induction pack.

Meetings with existing trustees

A discussion with some or all of the existing charity trustees provides an opportunity for the new charity trustee to learn everything which they need to know initially, in order to make the maximum contribution as quickly as possible.

Meetings with the Chairperson

The Chairperson should meet each new charity trustee prior to his or her attendance at the first board meeting in order to clarify board roles, discuss expectations and inform them about current issues and governance priorities.

Meetings with key employees and volunteers

If the charity has a manager/CEO, he or she should also meet each new charity trustee prior to their attendance at their first board meeting. It may also be useful to speak with other key employees and volunteers within the charity. This provides an additional opportunity to discuss any queries the new charity trustee may have in relation to the documents contained in the induction pack and provide additional information about how the charity operates on a day-to-day basis.

Where relevant, an induction process might also involve visits to premises used by the charity, introduction to senior management, meeting with beneficiaries and service users of the charity, mentoring by an existing charity trustee, and assessment and provision of necessary training and development.

The induction process should benefit all involved, ensuring that the board of trustees gets to know the new charity trustee and finds out about their interests, strengths and skills. It also helps the new charity trustee to gain a clear understanding of how the charity operates, in order to make an effective contribution to the control and management of the charity.

Other Relevant Documents

This document should be read in conjunction with our [‘Induction Pack Checklist’](#), [‘Guidance on Code of Conduct for charity trustees’](#) and [‘Guidance for Charity Trustees’](#)