



An Rialálaí
Carthanas

Charities
Regulator

Induction pack checklist

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.

Induction pack checklist

Introduction

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.

Key documents to be provided

Each charity trustee should be provided with an induction pack. Materials to include in the induction pack are as follows:

- A letter of welcome (from Chairperson);
- The charity's governing document;
- A brief history of the charity and an outline of the current work;
- A recent progress report describing the charity's position in relation to any targets or goals;
- An Organisation Chart, if applicable;
- A list of current charity trustees and the Chairperson, the charity secretary and their contact details;
- The minutes of recent board meetings;
- A schedule of forthcoming board meetings;
- A list of the board sub-committees, names of trustees serving on the sub-committees and their meeting schedule;
- The annual report and accounts for the past two years;
- The charity's Code of Conduct for charity trustees;
- A Declaration of Interests form;
- All policies within the charity, or a list of such policies and an indication of where they can be obtained;
- Details of the guidance documents available on the Charities Regulator's website;
- The Charities Governance Code.

Other Relevant Documents

This document should be read in conjunction with our guidance on 'Recruitment and induction of prospective charity trustees', 'Guidance on Code of Conduct for charity trustees' and '[Guidance for Charity Trustees](#)'.