

# A matter of trust



Eleanor Urben explains the benefits of becoming a charity trustee.

## TEN SECOND SUMMARY

- 1 **Becoming a charity trustee is a great way to become involved in a community and find out about the not-for-profit sector.**
- 2 **Generally, a trustee position will be for three years, so ensure that there is commitment to remain engaged with the organisation.**
- 3 **The induction process should include key documents including the latest annual report and the organisational strategy.**

**T**aking on a charity trusteeship is a rewarding and beneficial way to volunteer. It provides the chance to support and shape the work and strategic direction of an organisation, and a significant difference can be made to a cause that matters. It is a great way to become involved in a community or find out more about the not-for-profit sector.

Being a trustee can also offer the opportunity for professional development. It can provide experience of strategy and leadership, and boost a CV. It will supply the practical experience of being a non-executive director and develop skills such as influencing, negotiating, and managing risk.

For those who already have significant experience in these areas, it can be stimulating to use it in a different and potentially challenging context. Often, trustees say that being a board member has been one of the richest sources of learning in their professional lives.

Board members will come from different professions and sectors, and it can be interesting

and inspiring to work with people from different backgrounds. For a new trustee, it can be affirming to see how valued their expertise is by people from different professions. Every board member needs to develop a good understanding of their charity's finances, so financial expertise is essential.

Some accountants eschew treasurer positions, concerned that it will be too similar to their day job. However, this is not the case because all trustees share collective responsibility for the charity and treasurers have the same role as other trustees in strategic decision making. However, a good treasurer plays a key part in ensuring that all trustees understand their financial position.

So, how does one become a trustee and what the recruitment process involves.

### Choosing the right trustee role

Giving time on a voluntary basis means it is crucial to take on a trustee role for a charity whose cause is motivational. A standard term for a trustee position is three years, so before applying for a role, consider whether you will remain engaged and committed to the organisation. Often, people take on a trustee role with a charity whose cause they have a personal connection with, or interest in, but do not feel that it is essential to start with a burning passion for a specific cause: people often find that their interest grows as they learn more about an issue or an organisation's work. Let's have a look at the recruitment process.

### Applying for a role

Organisations vary in how they recruit trustees. However, a typical recruitment process involves:



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## BACKGROUND INFORMATION

Some areas should be explored before formally accepting a trustee position.

1. Find out about the vision, mission and values of the organisation. Because time will be given on a voluntary basis it is essential that these resonate with the volunteer.
2. Ask about the make-up of the board. These are the colleagues with whom you will be collectively responsible for the charity so it needs to be a team you want to join. How many board members are there and how long have they been in post? Why has a vacancy arisen? What is the demographic mix? How well do the trustees work together, and what is their relationship with the chair and the CEO? Finding out about this will provide insight into the board and if it is the type of organisation one would like to join.
3. Ask about the financial position of the charity and its resources. Every charity files its accounts and trustees' reports with the Charity Commission (England and Wales) or OSCR (Scotland). These documents provide a rich source of insight into the charity. Also, ask what is the charity's appetite for risk?
4. Check the legal structure. This determines the level of personal liability that trustees assume. If the charity is also a company limited by guarantee, or a COI, then trustees have limited liability. Request to see the governing document as it provides clarity on the expectations of the trustee role.
5. Clarify the time commitment of the role and be realistic about commitment to it. It is important to establish the expectation the organisation has for its trustees. For example, do the current trustees take a more hands-on approach within the organisation or are they expected to attend only the scheduled board meetings? Where and when are board meetings held? Are there opportunities to become more involved, say through subcommittees? A subcommittee is a great way to support more aspects of the charity's operations and could provide insight into finance, audit, risk, nominations, fundraising or other areas.
6. Ask about the organisation's strategic plan and board priorities for the next few years. This will inform the kind of input and time commitment the role will require. For example, is the organisation planning a significant change that will require a greater time commitment? What skills, experience, capabilities and value can the volunteer bring to the board to support the achievement of those goals? Joining a charity at a time of change can be rewarding because a significant contribution can be made.
7. Find out whether there is an induction process in place and what it involves. Poor induction is one of the most cited reasons for individuals stepping down prematurely. Having time to learn about the organisation and accessing key information will help in becoming an effective board member more quickly. Don't be afraid to ask whether training is available: this can help become a more effective member and will support professional development.

- Application by CV with a covering letter or application form.
- Opportunity for informal chat or an open day.
- Interviews, which may be formal or informal in style.
- Appointment, which may be immediate or after observation.

Those who are interested in a particular organisation may contact them directly to express interest, establish whether there are any trustee positions available and, if so, the application process.

Those who would prefer to explore different trustee opportunities can register with websites such as Reach Volunteering where hundreds of different roles are advertised by charities across the UK.

Organisations will also advertise on sites such as Charity Job, The Guardian, local volunteer centres and their own website.

### The interview

Once an application has been made for a trustee role the candidate will be invited to an interview, which can either be informal or formal based on how the charity recruit trustees.

There may also be the opportunity of an informal chat with the chief executive, chair or other trustees. Some charities suggest that the applicant should attend a trustee meeting so they

can see the board in action. Whichever format the process takes, it should be a two-way dialogue and provide as much opportunity to get to know the charity as it does for the charity to make the acquaintance of the applicant.

### The induction process

During the induction process the organisation should provide key documents such as the governing document, the latest annual report and the organisational strategy. Have a look at the Charity Commission's useful *Charity trustee welcome pack* ([tinyurl.com/yajk8yrm](http://tinyurl.com/yajk8yrm)).

An organisation may offer a "buddy", who is an existing board member who can mentor the new trustee through the first few months. This can be particularly useful for those who have not been a trustee before or are young.

### Take your time

Becoming a trustee can be a wonderful opportunity to use professional skills for social good. It is important to take time to find the right role, which fits with your interests, skills and can work with other commitments. If a charity's trustee recruitment process does not provide enough opportunity to explore mutual fit, do not be afraid to ask more questions.

It is estimated that almost half of all charities are looking for trustees at any time, so there is certainly the ideal role out there somewhere.

## REACH VOLUNTEERING

Reach is a skills-based volunteering charity in the UK and the single biggest source of trustees for the voluntary sector in the UK. Connecting people, skills and good causes is our mission and our passion

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