



governancehub

Starting on the Right Track

A Guide to Recruiting
and Inducting
a New Chair

The Governance Hub is a partnership of eight organisations that provide support to the voluntary and community sector: Association of Chief Executives of Voluntary Organisations (acevo), the Black Training and Enterprise Group (BTEG), The British Association of Settlements and Social Action Centres (bassac), Charity Trustee Networks (CTN), East Cornwall Council for Voluntary Services (ECCVS), the National Association for Voluntary and Community Action (NACVA), the National Council for Voluntary Organisations (NCVO) and Volunteering England.

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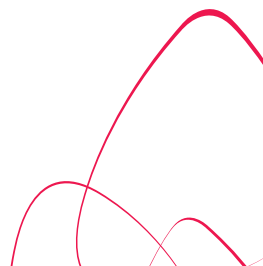
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A Guide to Recruiting
and Inducting a New Chair

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Introduction

All over the country hundreds of thousands of individuals serve on the trustee boards, committees or governing bodies¹ of charitable, voluntary or community groups. Your organisation may be a support group working in your neighbourhood; or you may be providing a range of services and employing a staff team.

All organisations have a chair². The chair is a member of the trustee board and their role is to chair meetings of the board. In some organisations, the chair may take on additional duties over and above their chairing role – like managing staff or acting as a spokesperson. It can be a complex task and, whatever the duties of different chairs, there can be expectations and demands on the chair which can be different from those placed on other trustees.

Trustees and chairs are the backbone of voluntary organisations. The effectiveness of the trustee board, and the chair's role in it, are central to a well run, happy organisation.

You would think it vital that finding and supporting a new chair is a top priority in voluntary organisations. But unfortunately, only a minority of chairs receive even a basic introduction or induction into their roles and responsibilities. Furthermore, the vast majority of organisations recruit their chair simply through 'word of mouth'?

This guide helps you plan and carry out the recruitment and induction of your new chair. It is short and easy to use, aimed at the trustee board – who have responsibility for organising recruitment and induction – and also the staff member (if you employ staff) or volunteer who may be given the job of organising the day to day aspects of the process. The guide is aimed at smaller organisations with no or few staff. Good recruitment and induction could cost very little but bring great benefits.

If you already have a recruitment and induction process in place for your chair, this guide can still be useful – you may pick up new ideas, or you could use the guide as a checklist to review your current programme.

This guide may also be useful and relevant for recruiting or inducting a vice chair, if you have such a role. You may have to adapt and be more selective in what you use from this material depending on the scope of the tasks assigned to your vice chair's role.

1 This guide is written for registered charities – see appendix 1 for advice on using this guide in a non-registered voluntary or community organisation.

2 You may use chairman, chairperson, chair of trustees, chair of council or some other name.

In this guide

This guide includes advice on:

- organising recruitment
- clarifying the role and identifying skills
- finding the best candidate
- formalities
- planning and organising the induction



This icon is used to highlight important stages in the induction of a new chair. These are parts of the induction process that we recommend you complete as a minimum.

I. Getting started

Your rules

The first stop in recruiting your new chair is your governing document. You must carefully consult this. Some organisations have detailed procedures for the appointment of a chair which may in themselves take several weeks or only take place at an Annual General Meeting.

On the other hand, some organisations place the responsibility of finding a new chair with the trustees. Either way, it is vital to plan any formal procedures into your timetable.

Who can be chair?

The chair is a trustee. If your organisation is a registered charity, the prospective chair must be eligible to serve as a charity trustee. Trustees must be:

- over 18 (certain exceptions apply, with Charity Commission approval)
- not an undischarged bankrupt
- not previously removed from trusteeship of a charity
- not disqualified as a company director
- not convicted of an offence involving deception or dishonesty (unless the conviction is spent)
- not disqualified as a trustee

Your governing document may place additional restrictions on who can be a chair, for example,

- they may need to be a member of your organisation
- they may need to be a trustee already

Terms of office

Check your terms of office – any procedures that limit the length of time your chair can serve. Is it time for your chair to step down, or face re-election?

How is your chair appointed or elected?

Your governing document may include detailed procedures for how your chair is formally appointed or elected. There is no set procedure – here are some examples:

- trustees may have the authority to appoint a new chair – but sometimes only until the next annual general meeting (AGM)
- trustees may appoint a chair only from within the trustee board
- the chair may be elected by members at an AGM. They may be nominated by another member or they may need to be a member themselves. There may be detailed and strict time procedures for notifying members of vacancies and of individuals who have been nominated

How long will it take?

It is recommended you start the recruitment process several months before the post of chair becomes vacant. You may have complex rules to follow – or you may be considering making changes to your rules (see below).

For example, if your AGM is in October you may need to start organising recruitment of a chair well before the summer, to make sure you have a candidate (or candidates!) ready to be elected by members at the meeting.

If your chair is elected by members, can trustees still advertise and interview candidates?

Yes, if this is appropriate to your organisation and complies with your rules – but remember that the final decision in this case will not be left to trustees.

Trustees can advertise any vacancy – after all, if candidates for chair are nominated by and elected by members, how do members come to know that there is a vacancy and to identify who might be a suitable candidate to put forward?

Whether or not trustees interview candidates in the case of membership organisations will depend on the organisation's rules and how appropriate it is for trustees to influence the decision of members:

- in some organisations, trustees advertise, select and recruit a chair who is then recommended to members – members may put forward an alternative candidate if they wish
- in other organisations, all candidates are put forward for election, but trustees interview them beforehand and let members know who is their preferred choice
- alternatively, trustees may prefer only to advertise a vacancy and leave all deliberations to members, without giving them a steer except to circulate biographical details

Changing your rules

For some organisations a vacancy in the role of chair may be a rare event – if so, it may be an opportunity to review your rules for appointment or election.

For example, you may wish to introduce a term of office if you do not have one. Or you may wish to lengthen the term of office if, for example, a new chair is elected every year and you would prefer some continuity.

Remember that any changes to your governing document require approval at a general meeting and, in some cases, prior approval by the Charity Commission if you are a registered charity. Check your governing document carefully and consult a guide like *The Voluntary Sector Legal Handbook*. Take professional advice if you are unsure.

Above all, if you are considering changes, ensure you plan in enough time.

2. What are we looking for?

A clear understanding of the role of the chair is vital before any recruitment activity commences. There is sometimes a perception that the chair is the boss – in charge of the organisation, with a wide-ranging workload, authority and remit. The reality is that the chair is a trustee like any other board member, but who takes on additional specific duties. Of these additional duties, the only legal duty specific to a chair is to chair meetings of the trustee board.

Frequently chairs take on further duties over and above their chairing role, because of an organisation's size, history or circumstances (eg staff management responsibilities) or because the chair had certain skills to offer. Some of these are listed below. These duties are not duties specific to the role of chair but are additional and in other organisations may be carried out by other individuals – and you may wish to reconsider them if you are recruiting a new person to the role of chair.

All organisations are different – do not make assumptions about the role over and above the duty to chair trustee board meetings.

How to clarify the role of the chair

- check your governing document to see what it says about the chair, especially things like 'casting vote' – or check any by-laws or standing orders you may have
- check your chair's role or task description if you have one
- hold a discussion with trustees, head of staff and outgoing chair to clarify the role
- draw up a role description and person specification (see page 13)

The chair as trustee

Your chair is a full member of the trustee board with the same responsibilities as other trustees (these apply if your organisation is a registered charity. If it is not then similar duties may apply but are not necessarily identical):

- ensuring the organisation complies with the governing document
- 'duty of care' - acting reasonably and prudently, according to your own expertise
- complying with the law
- protecting the property of the organisation - buildings, equipment, reputation
- acting in the best interests of the organisation - avoiding conflicts between your trustee role and other roles

- acting collectively as a trustee board
- seeking advice when you are not confident about taking a decision
- not benefiting financially unless allowed (apart from out of pocket expenses)

The chair of trustee board meetings

All chairs are responsible for formally chairing trustee board meetings. Chairs may, in addition, carry out some of the following duties associated with chairing the board:

- signing agreed copies of the minutes of past meetings
- planning the agenda with other officers and/or staff
- ensuring the board has and uses the skills it needs
- ensuring the board complies with law and good practice (this could be partly delegated to the secretary or another person)
- some chairs having a casting vote in the event of a tied decision
- some chairs take occasional decisions on behalf of the board in an emergency, when it is not possible to call a board meeting ('chairs action')
- some chairs provide informal or formal support to trustees between board meetings (this could include induction, appraisal, mentoring or informal guidance)

The chair of other meetings

In addition, sometimes chairs may:

- chair or participate in other committees or working parties of the organisation
- chair the AGM

Leadership responsibilities

Sometimes chairs may:

- act as a spokesperson for the organisation (for example, with the media)
- act as a figurehead in the community (for example, speaking at fundraising events)
- actively fundraise
- are appraised by other trustees and staff

Where staff are employed, chairs may also:

- line manage and appraise the head of staff / chief executive³
- work with the trustee board and head of staff to draw up the strategic plan
- formally resolve conflicts (for example, as part of employment procedures)

Operational responsibilities

Sometimes chairs are asked to take some responsibility for operational matters – for example in organisations where no staff are employed. If this happens in your organisation:

- list all the specific operational duties you expect the chair to carry out
- estimate the time commitment involved per month or per week
- will the new chair have the time to carry out these tasks? Will they have the skills?

Limits to the authority of the chair

- The chair's authority is only as a member of the board, not as an individual
- The chair can only act in accordance with the wishes of the board as set out in the governing document or agreed policies
- If the chair has authority to take certain decisions between meetings – where it is not possible to call a board meeting – such authority should be in writing (in a role description, board minutes or policy like a scheme of delegation) and agreed by the board. Decisions and actions must be reported accurately and promptly to the board
- The chair must fulfil their legal responsibilities as a trustee
- The chair must act in the best interests of the organisation at all times

³ Head of staff means the paid person who manages the day to day affairs of the organisation – you may use a different term, like manager, co-ordinator or chief officer.

3. Drawing up a role description

A written 'role description' can be a very helpful document to clarify the role of the chair and the skills, knowledge and attributes involved in carrying out the role. It can be very helpful both for those recruiting a chair, those interested in the role and for the new chair themselves.

Use the exercise below to draw up a role description and person specification for the chair:

- in the first column, list the duties of the chair in your organisation, using the previous section as a guide. You can be as specific as you like if you wish – for example, under 'chair of trustee board meetings' you could include duties like 'keeping meetings to time' or 'ensuring the board concentrates on its strategic role rather than operational details'
- In the second column identify the skills the chair needs to carry out this role – this information will provide the person specification
- the third column can be used to plan out the induction of the chair (see page 17)

Specific role and duties	Skills required	How to develop these skills
The duties of a trustee	Objectivity Ability to work as a team	Observing board meetings Attending training Joining a trustee network
The chair of trustee board meetings	Listening Timekeeping Summarising issues	Observing the outgoing chair Attending training
Any additional roles (see page 10)		

4. How do we find good candidates?

Put yourself in the position of a new chair. Where do they get their information from? What clubs or networks might they be involved in? What are the benefits to them of getting involved with your organisation? This will help you choose the best ways to get your message across to the kind of people you need.

There are a range of options – many of them free. You can get help from volunteer centres, trustee brokerage services or recruitment agencies. The Governance Hub has a listing of services on its website www.governancehub.org.uk. You can also use special internet sites such as www.do-it.org.uk.

Use relevant networks: local, national or specialist, and ask them to help spread the word for you to their members. You can try advertising – use free options like a local volunteer centre, library, community centre, Council for Voluntary Service (CVS), umbrella body newsletter or GP/health centre. See if you can get a feature in a relevant newsletter or in the local newspaper.

If your chair is nominated from your membership, you can still advertise your vacancy to members and use the ideas below to promote the vacancy. After all, how will members know that there is a vacancy? How will members know about the responsibilities and time commitment in being chair?

You will also need to include existing trustees as possible candidates. Support and training could be provided to help existing trustees to take on the role.

Stuck in your ways?

Most voluntary organisations find their chair by looking around and asking people they know. Will this 'word of mouth' approach find you the best person for the job? Would you do it if you were looking for a paid member of staff?

It is easy to do things the way we always have without stopping to think whether it's the best way.

Word of mouth recruitment might find you somebody you know, who can settle in quickly but you will be missing out on a whole pool of talent.

Activities

- List all the different ways you could promote your vacancy and then choose the best ones for you
- Make a list of the benefits of being a chair and remember to point them out. Try to get a first person quote from a chair about what makes the task worthwhile
- Write a short punchy notice or advertisement to tell people about your vacancy
- Prepare an information pack for candidates
- Make sure all trustees promote your vacancy widely

5. How do we choose the right person?

By now you should have one or more potential chairs. They may have applied through your advertising process, or they may have been formally nominated via your organisation's rules.

Check who is making the final decision. Is it a decision by members at an AGM? Can the trustee board decide between themselves?

If trustees make the final decision, you may decide to go through a selection process, to narrow down applicants and create a shortlist.

If members make the final decision, you may, if you think it appropriate, consider ways of helping members choose between the candidates. Remember that what you do may be restricted by your rules. Some options include:

- asking all candidates to write a short biography for circulation to members
- shortlisting one candidate, who is then nominated by trustees and put to members. Members may have the right to put forward an alternative candidate
- choosing one candidate as a 'recommended' candidate – but other candidates may be entitled to stand for election too if they wish

Selection

If you decide to make a selection, you should have a method of assessing candidates. This should be based on criteria, like a role description and person specification, listing the skills, knowledge and attributes required of the chair.

Start by agreeing the 'must have' qualities from the person specification. Then, agree how you will assess them. Make sure those conducting the selection and making the decision or recommendation understand the role and the key qualities needed.

Arrange an interview. This can be by telephone or face to face. If possible, have two people representing the organisation. This may be someone from the board nominated for this task, the head of staff if you employ one, or an external and independent person. It can be reasonably informal; it is an opportunity for the candidate to find out about the role and discern whether they can make the commitment, as well as an opportunity for the organisation to explore whether this is the right person for the role.

Even if you only have a single candidate, an interview is still a good idea. It helps to formalise the process and make sure that the potential chair and the organisation make an informed decision.

When you have made your decision or recommendation, remember to thank everyone who applied – not just the successful or preferred candidate. Consider whether you can involve any unsuccessful candidates in your work in other ways.

6. Have we covered all formalities?

Finally, there are important formal details you need to attend to:

- ensure the new chair is eligible to serve as a trustee:
 - ask the chair to sign a declaration or complete a nomination form including a declaration that they are eligible
 - carry out your own checks on eligibility. Many of these can be done by telephone or online. For more information, see the fact sheet on this on www.communitylinksbromley.org.uk
 - children's charities and certain charities working with vulnerable people may need to obtain a disclosure from the Criminal Records Bureau (www.crb.gov.uk) (note that if your organisation is not a registered charity, not all of the above apply. See appendix I)
- take out references if desired
- ensure the chair is properly elected or appointed in accordance with the governing document, for example:
 - if members make the decision, does the chair have to be formally nominated by a member or recommended to members by trustees?
 - if trustees make the decision, has the decision been formally minuted at a board meeting?
- notify Companies House on form 288a if the chair is a new member of the trustee board
- notify the Charity Commission on the Annual Return, if your organisation is a registered charity
- update other paperwork – bank mandates, insurance policies, trustee board mailing lists, trustees' induction pack or legal documents where trustees are specifically named
- let the organisation and its partners and funders know about the new chair

7. Induction

Induction is an opportunity for a new chair to settle into their role. The induction should allow the new chair to gain an understanding of their duties and responsibilities, get to know the organisation and access any support, training or development they may need.

Some chairs value personal development opportunities and have time to carry them out; others may feel a lifetime's experience in the workplace equips them for their role. Others still may believe passionately in the cause but feel they lack skills or confidence.

Yet, all chairs require certain skills and qualities to carry out their job, and all chairs certainly need information and clarity about their role and duties. This is why induction is important.

Four steps to inducting a chair

Step 1: The key responsibilities

The factual level involves inducting a chair into the essential duties and responsibilities and the role of a voluntary organisation.

The minimum

- Planning the induction – use the exercise on page 13 to identify the chair's roles and duties
- Written documents – creating an induction pack (page 19) and role description

Also consider

- A discussion, briefing or training session on trustee roles and responsibilities (page 21)

Step 2: Understanding the role

Go beyond the role description or written induction pack and ensure the chair has a clear understanding of their role.

The minimum

- Face to face meetings with the outgoing chair and head of staff (if you have one) (page 21)
- Getting to know the other trustees (page 22)

Also consider

- Shadowing the outgoing chair (page 22)
- Mentoring with a chair of another organisation (page 22)

Step 3: Getting to know the organisation

Learn about the history, culture, values, traditions and issues facing the organisation.

The minimum

- Get to know people, premises, projects and events (page 23)
- Face to face meetings (page 21)

Also consider

- Attending events and briefings to understand the wider policy environment the organisation is operating in (page 24)
- Discussion or reading about the voluntary and community sector and what makes it distinctive, especially about its values base (page 24)

Step 4: The chair's own development

Ensure the new chair settles into their role and can access support and development opportunities.

The minimum

- Induction checklist for the new chair (page 25)
- Accessing support and advice (page 23) and further reading (page 24)

Also consider

- Skills audit exercise for the new chair (page 23)
- Setting up an appraisal (page 24)

8. Putting together your induction

How your induction programme will run will depend on what suits your organisation. You may prefer something quite formal, with a written timetable agreed with the new chair. Or you may prefer something informal with an induction pack along with a series of meetings. To help plan your induction, refer back to the exercise on page 13. Use the third column to plan out the kind of activities you think would benefit your chair, using the previous page of suggested activities as prompts.

The following pages describe twelve areas including model documents, ideas and exercises for your chair's induction. They are not intended to be formal (except for the induction pack) or expensive (unless you decide they should be so).

There are no hard and fast rules, but it is recommended that the six essential areas (marked with the lightbulb icon) are carried out in **all** organisations where the chair is new to the organisation.



I. The induction pack

The induction pack is the foundation of any induction: the chair should be given one to keep. The pack should be reviewed every year (ideally just before the AGM).

If the chair is an existing trustee you may not need to create a new pack, rather to check that any documents specific to the chair's role are included (all trustees should receive an induction pack which will usually include similar information to this list below).

The pack may contain a lot of information. This is why a minimum level of information is suggested to begin with, and why a number of different induction activities are suggested: do not just rely on an induction pack!

The pack should include as a minimum:

- governing document
- standing orders
- sets of recent board papers and minutes and dates of next meetings
- terms of reference for committees, sub-committees, working groups
- annual Reports and Accounts for the previous three years
- policy documents including equal opportunities and financial controls
- a description of the duties of the chair, including their duties as a trustee and a list of expected skills, qualities, knowledge and experience
- profiles of trustees and contact details
- chief executive / head of staff's job description if you have one

Consider including guidance about the organisation:

- history
- mission statement
- structure (committees, user groups, staff and volunteers)
- offices or buildings
- newsletter / other marketing materials

Formal documents about the organisation:

- business plans/strategic plans/work programme
- details of how the organisation approaches staff appraisal (if staff are employed)

Documents about the organisation's governance:

- task descriptions of other trustees and honorary officers
- any manual giving guidance on trustee roles and responsibilities used by your organisation, including any guidance from relevant national bodies
- code of conduct for trustees and agreement – this might list the values trustees are expected to uphold (eg confidentiality) and practical things
- self-assessment form to indicate skills, experience, interests and support needs

Other useful governance documents:

- Charity Commission publication *CC3: The Essential Trustee*
- the pocket-sized summary edition of *Good Governance: A Code for the Voluntary and Community Sector*
- the pocket-sized summary version of the *Trustee & Management Committee National Occupational Standards*

Checklist

- The names of trustees and officers and what they do
- How long trustees serve for
- Frequency, dates and length of trustee meetings
- Sub-committees
- Date of the next AGM
- A brief background to the organisation (history, funders, staffing, achievements)
- The role of the chair and how long they can serve for

2. Discussion, briefing or training on trustee roles and responsibilities

You could use the opportunity of a new chair to refresh all trustees on governance and trusteeship essentials. This could be followed by a social event when trustees have an opportunity to get to know each other and the new chair. The session may include:

- briefing on the organisation's history
- review of important documents such as the governing document and other organisational policies
- discussion of the duties and responsibilities of trustees
- discussion of the skills involved in an effective board



3. Face to face meetings

Face to face meetings with key people are vital to get a really good understanding of what will be involved in the role of chair. These need not be formal but should always be offered to the new chair, regardless of the size of your organisation – meetings over a coffee or lunch could be ideal. Who 'key people' are will vary: the head of staff (if you employ staff) and (in larger organisations) other senior staff; the president or any patrons; the vice chair and other officers on the board; volunteers; service users; funders; local authority; or partner organisations.

Suggested topic areas for the meetings include:

- the organisation's structure or activities
- the role of the board
- the role of the chair
- the time commitment involved in the role of chair
- skills and interests the chair could contribute to the organisation.
- the chair's relationship with staff (if employed)
- the chair's other interests (possible conflicts of interest)
- any support or training opportunities available
- the induction programme



4. Getting to know other trustees

If your chair is brand new to your board then at the first meeting of the new chair make a special effort to welcome the chair. Invite the new chair to:

- introduce themselves
- say what their previous involvement with the organisation has been
- say what skills and experience they bring to the organisation
- say why they decided to take on the role of chair

Existing members of the committee should introduce themselves to the new person and describe briefly their involvement with the organisation.

Tip: The chair could attend this meeting in an observer role, before they are appointed or commit to the position. This could link with shadowing the outgoing chair (see below).



5. Shadowing the outgoing chair

The new or prospective chair could spend a few weeks shadowing the current chair before they take office. Activities could involve:

- attending board meetings / subcommittees to observe the outgoing chair
- sitting in on meetings between the outgoing chair and staff/volunteers
- attending events or functions, perhaps where the chair is carrying out an 'official' duty on behalf of the organisation
- periodic one to one meetings or phone calls to chat or clarify points

Tip: If you can not do this before the chair is elected, ask the outgoing chair if they can spend time with the new chair after they step down.

6. Mentoring with a chair of another organisation

It's useful to offer the new chair the chance to meet others in a similar position. Are you part of a national or local umbrella body? Do you know chairs of other similar organisations where the chair may be willing to pair up with your chair? If you are stuck and are a local organisation, contact your local Council for Voluntary Service (CVS) – they usually have a directory of voluntary organisations (see www.navca.org.uk).

Many chairs say they benefit from external support or mentoring and feel it important that chairs are offered this type of support – see ideas 7 and 8 for some options. This may be a part of the induction that requires a budget.



7. Accessing support and advice

- Some groupings or regions have chair or trustee networks where chairs can get together regularly. The Governance Hub has guidance on how to set up a chairs network if there isn't one in your area
- The Governance Hub's helpline (0800 652 4886) is a useful source of advice
- Contacting your CVS (www.navca.org.uk) or other support bodies (for example, your national federation) to see if there is any local support or training available
- Charity Trustee Networks (www.ctnetworks.org.uk) are another useful source of advice and information



8. Getting to know people, premises, projects and events

It is really important the chair develops a thorough understanding of the life of your organisation. This includes a knowledge of your organisation's activities and issues, but also includes its culture, values and traditions – particularly if the chair is recruited from outside your organisation's existing networks or membership. Through visits and meetings the new chair should be able to describe your organisation's:

History	Partners and key relationships – organisations, agencies, people
Aims	Staff numbers
Activities	Volunteer numbers
Key issues – services, funding, procedures and regulations	Member numbers
Future projects or activities planned	Funders

9. Skills audit exercise for the new chair

This exercise can be carried out by the new chair.

Picture yourself as chair of a trustee board meeting:

- think through the meeting and consider the role of the chair. What will you be doing? List the activities
- list next to each activity what you feel would be the main skills required of you
- how do you think your own skills and experience can contribute to your new role? Do you feel you could benefit from further training or development? If so, how would you like to access this? What would you like it to cover?

10. Attending events and briefings about the wider context the organisation operates in

How much is the new chair aware of the external environment the organisation is operating in? Is there a need to find out more about changes in policy, regulation or funding? It can be frustrating for the chair – and for trustees too – to be expected to make decisions on important changes in services or activities without a clear grasp of the main issues or the wider context of the organisation's work.

The new chair may also find it useful to have discussions or access reading about the voluntary and community sector and what makes it distinctive, especially about its values base.

In the run up to the chair's appointment you could look out for forthcoming events or briefings on key topics. Or in larger organisations you could ask members of staff to give presentations to the chair – and to the trustee board. You may need to allocate a budget to this part of the induction.

11. Planning the appraisal of the chair

Some organisations provide the chair with the opportunity for an 'appraisal' – a review of their role, say every twelve months, where colleagues have the opportunity to confidentially feedback views on their performance. You may consider setting this up for your organisation if you think it appropriate – if so, it is important to think about this at induction stage.

It need not be formal or lengthy or expensive. A trustee (say, the vice-chair) could have an informal conversation with each trustee before confidentially feeding back views to the chair.

Your organisation may choose to adopt a more formal appraisal such as a '360 degree' appraisal for your chair. Talk to the Governance Hub to find out more about the different options and models.



12. Induction checklist

This final exercise is for the new chair. They may find it helpful to record their progress against each of these questions. The answers to the checklist are for the chair's own use.

Activity	Comments
Have you received an induction pack?	
Have you been offered an induction programme?	
Do you have a statement of your roles and responsibilities as a trustee and chair?	
Have you identified what you can offer by way of skills, experiences and knowledge?	
Do you have a copy of any trustee documents and policies (for example, a code of practice)?	
Do you know when the organisation was set up and its history?	
Do you know the aims of the organisation?	
Do you know about the activities of the organisation?	
Do you know how your organisation is funded?	
Do you know about the key issues facing the organisation?	
Do you know about future projects or activities planned?	
Do you know about other organisations or people your organisation has networks or special relationships with?	
Do you understand the structure of the organisation and your role in it?	
Do you understand the staff and volunteer structure and your relationship with staff and volunteers?	
Do you understand your role and responsibilities and expected duties as a trustee and chair?	
Have you met with trustees and the chief executive (if there is one) and had a site visit?	
Have you met and got to know the other trustees?	
Do you know how the work of the organisation relates to initiatives undertaken by other organisations?	
Do you have support or training needs and are they being addressed?	
Do you feel you are ready to take on your role?	

Useful resources

Websites

www.governancehub.org.uk is a website for trustees, chairs and those who support them.

It provides a host of free online resources covering every aspect of governance

www.ncvo-vol.org.uk has a wide range of online factsheets and best practice guidance

www.icsa.org.uk has a range of best practice guides

www.charitycommission.gov.uk has guidance on the regulatory requirements of charities

www.trusteenet.org.uk is an online network for trustees, run by Charity Trustee Networks

Publications

The following publications are available to purchase except where indicated. Governance Hub publications are also available to download for free from www.governancehub.org.uk

Guidance on the role of chair

A Chair's first 100 days (National Council for Voluntary Organisations – NCVO)

Good Governance: The Chair's Role (NCVO)

Guidance on the role of a trustee

The Good Trustee Guide (from NCVO)

The Essential Trustee: What you Need to Know (free from the Charity Commission)

The Charity Trustees Handbook (from the Directory of Social Change – DSC)

Guidance on best practice in governance

Good Governance: The Code of Governance for the Voluntary and Community Sector and the *Code of Governance Toolkit* (from the Governance Hub)

Learning to Fly: Piloting your Voluntary or Community Organisation (from the Governance Hub)
– an introduction to the Code for small organisations

Better Governance: An Introduction to Measuring and Improving Board Effectiveness (from the Governance Hub)

Tending your Board (from the Governance Hub)

The Good Governance Action Plan for Voluntary Organisations (from NCVO)

Boards that Work (from DSC)

National Occupational Standards for Trustees and Management Committee Members (from the Workforce Hub www.ukworkforcehub.org.uk) and the *Trustee Standards Toolkit*

Guidance on the relationship with and support for the chief executive

Leading the organisation: the relationship between chairs and chief executives (from the Association of Chief Executives of Voluntary Organisations – ACEVO)

Recruiting a new chief executive: a guide for chairs and trustees (from NCVO)

Recruiting a chief executive, chair and trustees – essential guide (from ACEVO)

Appraising the chief executive: A guide to performance review (from ACEVO)

The Board's Responsibility for Appraising the Chief Executive (from NCVO)

Setting Chief Executive Officer Remuneration (from NCVO)

Leadership Good Practice: The CEO's Role (from NCVO – due to be published spring 2007)

Research, analysis and discussion on the role of the chair

Partners in Leadership: A New Style of Governance and Management for Charities (from ACEVO)

A Polished Performance: findings from NCVO's Leadership Programme for Chief Executives & Chairs (from NCVO)

Interim Survey Findings – Support and resource needs of Trustees and Chairs in voluntary and community organisations (from the Governance Hub)

Chairs research: Report: summary of qualitative interviews with chairs of smaller, faith based, rural and young people's organisations (from the Governance Hub)

And finally...

Once your new recruitment and induction programme is in place, remember to review it, using this guide, each time a new chair is appointed or elected. Each time your organisation may have changed and you may require different skills from your chair and trustees. The new chair, too, will have different needs, interests and ways of learning. And don't forget to contact the Governance Hub to find out about updates and further resources. Good luck!

Appendix I: Guidance for organisations not registered as charities

This guide is useful for trustees / governing body members of all voluntary or community organisations, whether registered charities or not. However, like many Governance Hub resources, the guide is written initially for registered charities – but can be easily adapted. If you are not a registered charity your attention is drawn to the following points:

Terminology

The term 'trustee' is used in this guide for the purposes of clarity and consistency and, when used, does not imply that the particular action is only relevant to charity trustees unless specified below.

The role of the chair

The chair will still usually be a full member of your governing body with the same duties as other governing body members. These duties will be similar to those listed, but they may not be identical to the list. Check your governing document and any other rules you may have.

Formalities

Trustees of registered charities have to meet certain eligibility requirements as listed on page 7. If you are not a registered charity then these may not apply. However, there are eligibility requirements for companies limited by guarantee, those contained in your governing document, those in law and those which may be followed as good practice.

Trustees of certain registered charities are required or recommended to obtain a disclosure from the Criminal Records Bureau. If you are not a registered charity then this may not apply. However, there may be other requirements from other regulators or you may wish to adopt the Charity Commission's guidance as best practice.

Induction - discussion, briefing or training on trustee roles and responsibilities

The exercise on page 21 is still important, but it will not cover the formal duties of charity trustees.

Other references to charity law and the Charity Commission

Where relevant the guide has made clear which tasks are relevant only to registered charities.

Trustees and chairs are the backbone of voluntary organisations. The effectiveness of the trustee board, and the chair's role in it, are central to a well run, happy organisation.

Starting on the Right Track is produced by the Governance Hub and provides guidance to help you plan the effective recruitment and induction of a new chair.

The Governance Hub exists to improve governance within the voluntary and community sector in England by:

- increasing the supply of trustees
- enhancing trustee learning and development
- strengthening and extending support services for trustees.

Governance Hub c/o NCVO

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020 7520 2469	Media enquiries
020 7520 2514	Inquiries about the Hub's partnerships, tenders or policies
governance.hub@ncvo-vol.org.uk	General enquiries about the Hub, governance and board information
www.governancehub.org.uk	To access information, download free resources or sign-up to our e-newsletter