

**Trustee Induction Pack**

**Introduction**

Trustees have a vital role in the running of a Mothers' Union diocese so it is essential that those who are elected to the trustee board are fully aware, not only of their role and responsibilities as a trustee, but also of the work of the diocese.

The aim of this document is to offer a model of good induction practice so that those elected to the role of trustee are given enough information for them to carry out their role effectively – but not so much as to be overloaded or get a misleading impression of the work involved.

A Model Induction Pack for Trustees

Diocesan Documents

All new trustees should be given a set of documents to help them in their role. This should include:

*Diocesan Constitution/ governing documents*

Every trustee needs a copy of the current diocesan constitution/governing documents.

*Report and Accounts for last two years*

Trustees need to know what has been happening in the diocese and have an understanding of the current financial situation (e.g. are reserves regularly being used to meet a shortfall?). The report and accounts for the past two years give a new trustee the opportunity to see what has been happening and highlight areas where they may want to find out more.

*Recent minutes of trustee meetings*

These will give a new trustees an indication of recent discussions that have taken place, including future plans, etc. It is essential to give new trustees a copy of the minutes of the final meeting of the previous triennium to enable them to make sense of their first meeting. Minutes of the last two or three meetings are also helpful in setting the scene.

*Strategic plans for the diocese*

While some aspects of Mothers' Union development might be linked to the triennial system, other plans will be longer term. It is important to make sure that new trustees know about strategic/long term plans so they can appreciate the aims of the diocese and contribute to the direction of achieving these.

*Diary dates*

Most trustee boards set future meeting dates at the start of the year, but don’t forget to inform new trustees of the dates of diocesan events already in the diary at the earliest opportunity.

Other useful documents and websites

*Mothers' Union Diocese and Province Resource pages*

There is a range of information about being a charity trustee as well as practical information about the legal requirements relating to running a charity on the Mothers' Union website. These can be found on the Diocese and Province Resources page:

<https://www.mothersunion.org/resources/diocese-and-province-resources>

All trustees should be aware of the information on this part of the website.

*Charity Regulator Documents*

The Charity Commission for England & Wales provides a comprehensive range of information, including guidance for all trustees.

All trustees should know where they can find any policy documents relating to the diocese agreed by the trustee board, such as the safeguarding policy, privacy policy, etc.

Recommended Induction Training Programme

*Diocesan Trustee Training session*

A programme of trustee training is organised each triennium for all diocesan trustees, including training sessions covering the main issues of which diocesan trustees should be aware.

*Diocesan projects and outreach activities*

It is important for all trustees to be fully aware of any diocesan Mothers' Union projects and outreach activities. If a visit in person is not appropriate or possible (Child Contact Centres, projects in prisons, etc), another opportunity should be found for trustees to know what is happening in the name of Mothers' Union in the diocese.

*Meetings with key personnel*

Trustees need to meet those people who are appointed or employed by Mothers' Union in the diocese, such as the diocesan secretary/administrator, the diocesan treasurer and the diocesan chaplain, so they have an understanding of their role and function in the diocese.

*Recognising skills*

An effective trustee board needs a mix of talents and skills and so it is important to find out the talents and skills of those on the board. The easiest way of achieving this is through the use of a short questionnaire. This can also be used for trustees to indicate any particular areas where they would welcome the opportunity to acquire or improve their skills. A sample questionnaire can be found at the end of this document.

*Personal guidance*

It can be helpful to pair a new trustee with a more experienced trustee to act as a buddy or mentor. This lets the new trustee find out background information and ask questions about agenda items in a less exposed setting than the board meeting.



Induction checklist

If you are a new trustee, you may find it helpful to record your progress against each of these questions. The answers to the checklist are for your own use.

* Do you have a description of your role and responsibilities as a trustee?
* Do you understand your role and responsibilities as a trustee?
* Have you identified what you can offer by way of skills, experiences and knowledge?
* Do you know where to access trustee documents and policies (eg a code of conduct)?
* Do you understand the structure of the organisation and your role in it?
* Do you know about the key issues facing Mothers' Union in your diocese?
* Do you know how Mothers' Union is funded in your diocese?
* Do you know about the activities of the diocese?
* Do you know about future projects or activities planned?
* Have you met and got to know the other trustees?
* Do you have support or training needs and are they being addressed?
* Do you feel you are an equal member of the trustee board, able to contribute fully?

*(adapted from NCVO website: www.ncvo-vol.org.uk)*



Recognising skills

Everyone will have their own particular set of skills to bring to the trustee board. You may have professional skills gained in employment. You may have skills gained through experience with Mothers' Union, with your church, or with other voluntary organisations.

There is nothing more demoralising than to have skills or interests that aren’t utilised. The aim of this form is for you to make your skills and interests known.

You don’t have to tick a minimum number of boxes to ‘qualify’ as a trustee! Be honest about what you feel you can offer to Mothers' Union in this diocese.

What kind of expertise do you consider you bring to the trustee board?

|  |  |  |  |
| --- | --- | --- | --- |
|  | Administration |  | Legal issues |
|  | Advocacy |  | Managing change |
|  | Communication |  | Managing staff |
|  | Conflict resolution |  | Managing volunteers |
|  | Customer care |  | Marketing |
|  | Equal opportunity issues |  | Presentations and public speaking |
|  | Finance |  | Project management |
|  | Fundraising |  | Public relations/media |
|  | Governance |  | Research |
|  | Human Resources |  | Sales |
|  | IT/Computer skills |  | Social media |
|  | Knowledge of Mothers' Union |  | Strategic planning |
|  | Knowledge of church structures |  | Website design/maintenance |

What other experience or skills do you feel you offer?

Are there any areas of Mothers' Union work in which you have a particular interest and/or would like to become more involved?

Are there any areas where you would like to improve your skills?

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