

Trustee Induction Session Content

This downloadable PDF can be used to develop your own tailored version of a trustee induction programme.

1. The organisation

- Vision, mission and values
- Legal structure:
 - registered charity; charitable incorporated organisation, charitable company, trust or unincorporated association;
 - trustees, members
- Governing documents: CIO constitution or Memorandum & Articles of Association; objects and powers
- Strategy and programmes
- Staff
- Properties and assets
- Public benefit

2. The trustee role

- Responsibilities (ref Charity Commission guidance The Essential Trustee)
 - Other expectations of trustees/roles & responsibilities for particular trustees.
- See sample Trustees' Training handout below.

3. Trustees, trustee meetings & policies

- How we operate: agendas, meetings, minutes, terms of office, reviewing trustee skills mix
- Board policies eg reserves policy; conflicts of interest; risk management;
- Sub-committees

4. Finances

- Budget cycle & approval
- Sources of funding and fundraising
- Regular accounts & how to interpret them
- Financial management: monitoring and forecasting
- Annual (statutory) accounts: audit or independent inspection; trustees report; understanding the statement of financial activities & balance sheet
- Financial issues for Board members to monitor
- Levels of authority

5. Any questions?