

Trustees Induction Pack Contents

This downloadable PDF can be used to develop your own tailored version of the contents for an induction training pack for trustees.

This may form part of a board or governance handbook or electronic folder. There are likely to be several stand-alone documents. Items 3, 4, 5, 10 and 11 are the most important to provide.

1. Trustee training handout (see below)
2. Organisation structure
3. Governance document eg Memorandum and Articles of Association or CIO Constitution.
4. Strategic plan (including vision, mission and values)
5. Latest annual report & financial statements
6. Latest management accounts
7. Twelve steps to understanding accounts
8. Fundraising case for support
9. Schedule of policies
10. Summary risk register
11. Charity Commission The governance jigsaw & 6 main duties
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/544220/Jigsaw.pdf
12. Charity Commission The Essential Trustee CC3 & CC3a
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/704641/CC3_may18.pdf and <https://www.gov.uk/guidance/charity-trustee-whats-involved>
13. Charity Commission 15 Questions trustees should ask
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/569550/15_questions_trustees_should_ask.pdf
14. Board skills matrix form to complete & return: see PDF at <https://www.helensheadlines.net/a-board-skills-matrix>
15. Companies House AP01 information for new company director's online completion by company secretary <https://www.gov.uk/government/publications/appoint-a-director-ap01>