

Start as you mean to go on

Trustee Recruitment and Induction Research Report

July 2005



The Charity Commission is the independent regulator for charitable activity. This is one of a series of reports that present our case-working experience, supplemented by additional research. Their purpose is to help increase understanding of an issue. They are part of our mission to help charities maximise their impact, comply with their legal obligations, encourage innovation and enhance effectiveness.

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# Introduction

Charities exist to create a better society. They operate for many different purposes, and in many ways. But they are united by their visions of a world without poverty, cruelty, disease, injustice or inequality. In England and Wales charities have long been a mainspring of positive social change. Behind them stand their trustees, who have the ultimate responsibility for running them.

Those trustees make a huge difference both to the charities and the communities they serve, and they do an excellent job. They devote time and effort, mostly without payment, to ensure a high quality of service to users and the wider community.

In the course of our casework, we see many examples of good practice in all sizes and types of charity. But when things go wrong and we get involved, we find that the root of the problem can often unfortunately be the governance provided by the trustees.

Effective trustee recruitment and induction is one of the underpinning principles of the forthcoming Code of Governance for the Voluntary and Community Sector. The Code states that, as a matter of best practice, a trustee board needs to have a diverse range of skills, experience and knowledge to run an organisation effectively. It also states that trustees should make sure that they receive the induction, training and ongoing support they need to carry out their duties effectively.<sup>[1]</sup>

It is therefore crucial that charities get the recruitment, selection and induction of new trustees right. That is why in 2002 we published Trustee Recruitment, Selection and Induction<sup>2</sup>, the first of our series of Regulatory Studies.

In that study we illustrated good practice and explained where there was room for improvement.

We made a commitment to consolidate our existing guidance in this area into one booklet. This will now be published as part of our CC range of leaflets<sup>3</sup>. We also said that we would update our publication The Hallmarks of an Effective Charity<sup>4</sup>. We have now done this and recruitment and selection is one of the areas we look at when we visit charities as part of our Review Visits programme.

We find that our publications about trustees and their responsibilities<sup>5</sup> are those most commonly requested by our customers, reflecting the enthusiasm in the sector for trustees to "get things right".

This report presents the findings of new research we have carried out into the processes and perceptions of trustee recruitment, selection and induction. You can see our survey findings in full in Annex A of the report. Where possible, we use examples to illustrate best practice. We also refer to areas where our other publications can give trustees specific guidance. This report does not replace the initial report, but develops the topic and should be read in conjunction with it.

It is aimed at all trustees of charities, and others who are involved in trustee appointments. The principles involved may also be relevant to charities recruiting key employees and volunteers.

<sup>1</sup> The proposal for a code of governance emerged in 2004 following discussions between NCVO, the Institute of Chartered Secretaries and Administrators (ICSA), the Association of Chief Executives of Voluntary Organisations (ACEVO), Charity Trustee Networks and the Charity Commission; and a subsequent consultation led by NCVO and ICSA.

<sup>2</sup> Recruitment, Selection and Induction of Charity Trustees (RS1)

<sup>3</sup> Finding New Trustees: What you need to know (CC30)

<sup>4</sup> The Hallmarks of an Effective Charity (CC60)

<sup>5</sup> Notably The essential trustee: what you need to know (CC3) and Trustee Recruitment, Selection and Induction (RS1)

# **Executive summary**

Most charities will recruit trustees from time to time. For some, this will happen annually; others will do so less often.

The process of finding and welcoming new trustees to an established board is an excellent opportunity to evaluate and improve on the charity's effectiveness.

In our experience, boards of trustees are more likely to:

- recruit successfully if they do so openly and transparently, taking care neither to overstate nor understate the responsibilities involved;
- operate successfully if they offer a comprehensive induction programme during which new trustees are provided with the key information they need to run the charity; and
- command confidence and respect from their client base and wider community if they demonstrate diversity in the widest sense of skills, age, sex, race and background.

Our casework shows that failure to give enough attention to certain key areas in the recruitment process can and does lead to problems. Where such problems arise, we find that their root is frequently the governance provided by the trustees. Often, difficulties result from trustees not knowing or understanding their responsibilities; or not having access to basic information about the charity's structure and remit.

### **Recruitment and selection**

While we have seen many examples of good practice, research for our earlier report found that few charities paid enough attention to the recruitment process and the opportunities it gives. We are pleased to see from our new research that there appears to have been an overall improvement in this area.

### For example:

 a larger percentage of charities now undertake a skills audit of trustees before recruitment (17% compared with 11% in 2001);

- a larger percentage of charities now use job descriptions to attract suitably qualified people (22% compared with 18% in 2001); and
- more very large<sup>6</sup> charities now use a dedicated committee to recruit trustees (16% compared with 12% in 2001).

In general, the use of such tools increases with the size of the charity, so that two thirds of large or very large charities use one or more of these methods. We recognise that larger and more complex charities will need a more formal and structured approach to recruitment. We do believe, though, that smaller charities also benefit from considering these issues, albeit with a more proportionate and simplified approach. Such measures neither need to cost a great deal nor add significantly to the trustees' workload.

While we welcome these signs of improvement, we are disappointed with our findings in other areas:

- more charities now experience difficulties at least sometimes in filling vacancies on the trustee board (39% compared to 31% in 2001); and
- use of word of mouth and personal recommendation as a method of attracting new trustees has significantly increased (81% compared to 68% in 2001).

In Trustee Recruitment, Selection and Induction, we stressed that recruitment solely by word of mouth or personal recommendation can result in a board that is not diverse and can give a perception of exclusivity which alienates the charity's users and wider stakeholders. Our new research has shown that 66% of large and 72% of very large charities find it difficult to attract new trustees with the right skills. Charities may find that wider and more inclusive methods of recruitment will make it easier to attract the right people. Being able to demonstrate openness and transparency can also, in the longer term, help to increase the public's confidence in charity. There are some examples of different methods in the main report.

 30% of charities we surveyed said they find it difficult to attract young people to serve as trustees.

This is echoed by our analysis of the trustee details we hold on our database, which shows that only 0.5% are under the age of 24. Conversely, 76% are aged 45 and over. Again, charities that wish to increase the diversity of the trustee board may need to think of alternative, wider methods of recruitment.

 The percentage of charities making checks on prospective trustees has significantly decreased (23% compared to 33% in 2001).

Some people are legally disqualified from acting as trustees. We expect charities to check that prospective trustees are eligible to act. A basic level of check is essential for any prospective trustee, as it is a criminal offence to serve as a trustee if disqualified from doing so. More rigorous checks are necessary if the trustee is to have direct contact with vulnerable people. The failure to make checks on the eligibility of prospective trustees is apparent across all four income bands, suggesting that it stems not just from a lack of resources.

### Induction

Trustees may not be paid for carrying out their role, but this does not mean they are 'amateurs' or unprofessional. Trustees are responsible for their charity's assets and activities and have a legal duty to act prudently and within the boundaries set by their charity's governing document.

Clearly, the type of induction programme necessary for new trustees will vary with the size and nature of the charity. In all cases, though, as a matter of good practice, we would expect there to be some procedures in place to familiarise a new trustee with the charity's aims and procedures.

We are pleased that our new research shows that there has been some improvement in good practice in this area. New trustees are now more likely to be given the key information they need to act in an informed and responsible manner from the early stages of their time with the charity.

For example:

- most charities including virtually all large ones
  now provide new trustees with some
  information as part of the induction process;
- in particular, more charities now provide new trustees with a copy of the charity's governing document (61% compared with 55% in 2001).

However, there is still room for improvement. Our findings show that across the four income bands, 39% of charities we surveyed still do not provide new trustees with a copy of the charity's governing document.

The governing document is an essential part of the induction process as it lays out the charity's constitutional aims and limitations. Providing new trustees with a copy need not be expensive or time consuming. We maintain that all trustees of charities, whatever their size and nature, need a copy of the governing document to be able to take up their role with confidence.

We welcome the improvement we have seen in some areas, and have found some excellent examples of good practice from the smallest to the largest of charities.

However, we would urge those charities that do not do so already to adopt as many as possible of these examples of good practice. Our experience tells us that they work, and that they improve the ability of trustee boards to work more effectively. And a well-balanced board of trustees can only increase the efficiency of the charity – and so enhance its contribution to society.

# **Findings**

### Trustees and governance

At the end of March 2005, the Commission held details of over 890,000 individuals currently acting as trustees of registered charities. Some of these will be trustees of more than one charity. Between them they look after around 190,000 charities with a combined income of over £36 billion. This figure excludes trustees of unregistered and exempt charities. Overall, we estimate that there are currently more than a million trustee positions in England and Wales.

Trusteeship is an opportunity to give something back to the community. It is also a chance to learn new, diverse skills and ways of working. Each trustee has a role in the charity's operation, and no one trustee is more important or accountable than any other. Although trustees are not usually paid for their services<sup>7</sup>, this does not mean they are 'amateurs' or unprofessional.

Trustees have an important say in the way the charity supports and provides services to its users. Whether the charity is a small, local project or a national household name, its trustees have the final responsibility for the management and administration of their charity. They must act prudently at all times in the best interests of the charity and its users, and are personally accountable for the proper management of the charity and its assets.

From our case-working experience we see many excellent examples of good practice. However, we also see that when things go wrong, poor governance can be part of the problem. The charity can get into difficulty when the trustees are not aware of, or do not pay proper attention to, their responsibilities.

While trusteeship is a skill which, like any other, develops with time, it follows that a new trustee is more likely to be effective and confident in his/her dealings with the charity if the recruitment, selection and induction process is well handled from the outset.

Our new research shows there are many charities from the smallest to the largest of income bands which have spent time and effort on 'getting it right'. However, there is also room for significant improvement. Obviously, the detail and complexity of the recruitment and induction process will vary with the size and nature of the charity, but as a matter of good practice, all charities will review their procedures periodically to ensure their effectiveness.

A robust and comprehensive programme of recruitment, selection and induction that is proportionate to the size of the charity will help to:

- attract the right applicants to complement the existing mix of trustees;
- involve new trustees in the charity's operation from the outset; and
- enable trustees to grow and develop in their roles.

### **Resources**<sup>8</sup>

**Trustee Recruitment, Selection and Induction** (RS1) and **Finding New Trustees: What you need to know** (CC30) provide further information on best practice and guidelines on recruiting trustees,

**The essential trustee: what you need to know** (CC3) answers some of the more common questions you may have about trusteeship and the duties of trustees.

**Payment of Charity Trustees** (CC11, Operational Guidance ('0G') 92) and **Remuneration – Small Charities** (0G205) explains when trustees can and cannot be paid.

A number of organisations offer guidance and training to charities in this area including **NCVO**, the **National Association for Councils for Voluntary Service (NACVS)**, the **Welsh Council for Voluntary Action (WCVA)** and the **Ethnic Minority Foundation (EMF)**.

<sup>7</sup> There are some exceptions. Occasionally, the governing document may make an explicit provision for payment of trustees. In some circumstances, we may be prepared to authorise certain payments. See Payment of Charity Trustees (CC11) and Payment of Trustees (Operational Guidance 92) and Small Charities: Remuneration (OG 205) for further details.

<sup>8</sup> There are many publications that trustees can use on recruitment, selection and induction, and these lists are just a small sample. They do offer a good starting point. Where not cited here, contact details for all organisations mentioned are in Annex D.

# Preparing to recruit

# Key survey findings<sup>9</sup>

- 44% of large or very large charities surveyed now carry out a skills audit of trustees when preparing to recruit (41% in 2001) although the numbers of small (4%) and medium (16%) charities carrying out a skills audit are, again, very low.
- 22% of all charities surveyed now prepare a trustee job description (2001: 18%). The likelihood of this happening increases with the size of the charity.

Most charities will need to recruit new trustees from time to time. Some will do so annually; others may need to recruit only occasionally<sup>10</sup>.

Whether recruitment is the responsibility of the existing trustees or whether other arrangements apply (for example, election or nomination by a membership), trustees have a clear role in overseeing the management of an open and efficient process.

The charity's governing document is a crucial first point of reference. We often see problems where the charity has not checked that its recruitment procedures meet the terms of any conditions in the governing document. To make sure that the charity's time, effort and resources are not wasted, the starting point for recruitment is to check the rules in the governing document.

### In particular:

- Is there a minimum or a maximum number of trustees?
- How are they to be appointed?
- How long can they stay in office?

It is useful for the trustees to consider once in a while if these rules are still appropriate. For example, it may be that there are not enough trustees to share the workload – or perhaps the board is so large it is unwieldy. A small change to the governing document may increase the charity's effectiveness.

In our experience, to operate effectively, a trustee board needs a diverse mix of skills, backgrounds and experiences. As well as professional skills such as financial, legal and management, a charity will also benefit from people:

- with varied life experiences and perspectives;
- who represent the stakeholders it works with; and/or
- with an understanding of governance and the ability to think strategically.

From time to time, it is a good idea for a charity to carry out an analysis of the skills that the board needs to run the charity successfully. It is then possible to look at the board's current composition to see if any key skills are lacking. A vacancy on the board is an ideal time for the other trustees to bring in new ideas and enthusiasm and to ensure that the trustee body remains fresh.

If the charity's governing document states that some or all of the trustees must retire after a certain period of office, the trustee board will find it beneficial to consider the effect that that loss of skills and experience will have on the operation of the charity. If they are aware that this will happen, they will be able to plan more effectively for the future.

<sup>9</sup> Full survey findings appear in Annex B.

<sup>10</sup> Even if the charity's governing document does not say that trustees must resign after a certain period, the board should still consider from time to time whether recruiting new trustees could bring fresh ideas and improve the charity's effectiveness.

### **Case study**

St Oswald's Hospice is a very large charity based in the North East which provides specialist support and care to adults and children who have life-limiting conditions.

We recently visited the charity as part of our Review Visits programme and found that it had a clearly defined recruitment, selection and induction process which works well and is regularly reviewed.



A cookery session at St Oswalds' Hospice children's service.

The charity uses various methods to recruit new trustees to ensure that the board is inclusive and representative of all its users. Interested candidates are then invited to a meeting with the charity's chair and Chief Executive. This gives both sides an opportunity to find out more about each other, not least that the candidate understands the commitment needed of a trustee. Wherever possible, trustees are recruited in groups of two or three so that they can support each other in their new roles.

The trustees have developed a detailed induction process which is reviewed from time to time. The most recently appointed trustees are invited to contribute to that review to determine whether it can be improved from their experiences.

New trustees are given a range of key documents. This includes the charity's governing document, the last three sets of accounts and annual reports, the current business plan, minutes of recent trustee meetings and a guide to being a trustee. Role descriptions are in place for trustees and honorary officers to clarify their particular roles and responsibilities.

As a result, the trustees have a good understanding of their responsibilities and potential liabilities; attendance at trustee meetings is generally good; and the charity rarely experiences problems in recruiting and retaining trustees.

When prospective trustees have a clear idea of the demands and responsibilities of the role from the outset, the recruitment process is more likely to succeed. This is true both in attracting suitable applicants and retaining new trustees.

An accurate trustee job description can help by giving prospective candidates a realistic idea of, for example, how much time they will need to devote to overseeing the management and administration of the charity. It is an opportunity to outline the types of duties the role will involve and any particular skills

needed<sup>11</sup>, as well as any support that will be given, such as an induction tour or ongoing training.

Spending a little time at the outset considering these issues will help to ensure that:

- the recruitment process is valid that is, in accordance with the governing document;
- the charity knows the kind of skills it is looking for; and
- prospective trustees can make an informed choice before applying.

<sup>11</sup> For example, the role of treasurer may be best filled by someone with accountancy or financial experience. Someone with skills in leadership, mediation and facilitation may make a good chairperson.

### Resources<sup>12</sup>

**Finding New Trustees: What you need to know** (CC30) and **Recruitment, Selection and Induction of Charity Trustees** (RS1) give further ideas for charities preparing to recruit.

For details of how to amend the governing document, see Alterations to the governing documents: charitable companies (0G47); Small charities: amendments to governing documents (0G203) and Small Charities: Alteration of Trusts, Transfer of Property, Expenditure of Capital (CC44); or Amending Charities' Governing Documents: Orders and Schemes (CC36).

**Charity Trustee Networks** produces a help sheet for trustee recruitment: "Recruiting Trustees: Avenues for Support".

### The recruitment process

Finding the right people

# Key survey findings

- 11% of charities surveyed always have difficulties filling vacancies on the trustee body (2001: 12%).
- 39% of charities sometimes have difficulties filling vacancies (2001: 31%).
- 9% of charities now use networking with other charities (2001:6%), and 6% now use press advertising (2001: 3%) to find new trustees.
- 81% of charities still rely on word of mouth and personal recommendation (2001: 68%).

Once the charity has identified any skills and experience it needs to complement the existing trustees, it must decide the best way to attract new applicants.

Our 2001 survey showed that trustees who broaden their recruitment practices and adopt more transparent methods find it easier to build an inclusive, diverse, vibrant and effective governing body.

We have seen some evidence in our latest survey that there has been a small increase in charities across the income bands using wider methods of recruitment. Networking with other charities and advertising in the press are both now more popular than they were in 2001<sup>13</sup>.

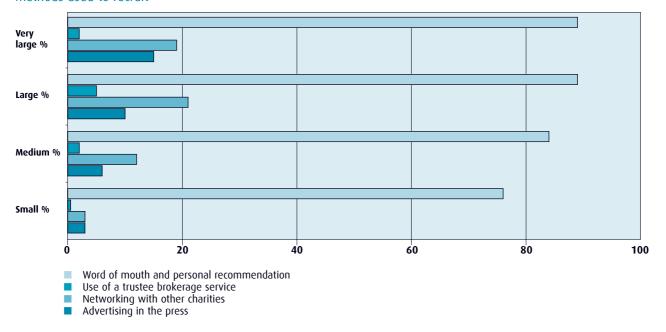
However, in our earlier report we remarked that current practice in seeking trustees relied to a striking degree on word of mouth and personal recommendation. This seems to have increased, with over 80% of all charities now using these methods to attract and recruit new trustees compared with almost 70% in 2001<sup>14</sup>.

<sup>12</sup> This is just a small sample of the guidance and support available. Where not cited here, contact details for all organisations mentioned are in Annex D.

<sup>13</sup> Networking with other charities 9% (2001: 6%); advertising in the press 6% (2001: 3%)

<sup>14</sup> Respondents to the survey were asked to tell us all of the methods of recruitment they use, so a proportion of these may also use other ways of recruiting. However, no other single method was used by more than one in ten charities.

### Methods used to recruit



We accept that this method of recruitment is valid and can succeed in certain circumstances. However, we find that where it is the only or main method the trustees use, it is the one most likely to restrict the pool of potential trustees and could result in the charity being viewed as exclusive. Charities which use only this method may find that they are missing out on a wider pool of skills which would improve their effectiveness. Being able to demonstrate openness and transparency in the recruitment process can also, in the longer term, help to increase the public's confidence in charity.

Where trustees are, for example, elected or nominated by the membership, advertising for new trustees would not normally be an option. However, by carrying out a skills audit as mentioned earlier, the existing board can still present the membership of a 'wish list' of the type of skills that would be desirable for a prospective trustee to have.

Nor does advertising have to be an expensive advert in a national newspaper. Our casework shows charities advertising vacancies in a variety of ways:

- internally, to charity service users and volunteers;
- in the charity's newsletter or on its website;
- at an open day to raise the charity's profile;
- in an article in the local free newspaper; or
- on church, community centre or village hall notice boards.

Our 2004 survey showed that charities in the large and very large income bands in particular think it is difficult to attract trustees with the right skills. We also found that charities that never have difficulty recruiting trustees were less likely to use word of mouth and personal recommendation than those that do<sup>15</sup>.

It is reasonable to assume that, when deciding how to find new trustees, charities are more likely to attract the 'right' candidates for their charity if they:

 consider using wider methods of recruitment, particularly where there has been difficulty recruiting in the past.

### **Diversity**

### **Key survey findings**

- 30% of the charities in our latest survey said that they find it difficult to attract young people to serve as trustees.
- A few also said they find it difficult to recruit people from ethnic minorities or for the board to reflect the diversity of the community in which they are based.

We welcome the awareness we have seen during our research that diversity on the trustee board is important. A charity with a diverse board of trustees is more likely to:

- engage effectively with the community it serves;
- respond effectively and equitably to the needs of its users; and
- increase accountability and public confidence in its work.

Almost a third of respondents to our survey said they find it difficult to attract young people to act as trustees. In addition, analysis of the trustee details we hold on our Register<sup>16</sup> shows that 76% of trustees are aged 45 and over. It is acknowledged that those with a younger age profile are less likely to have free time because they tend to have heavier commitments to family, work or both.

It is perhaps surprising, though, that only 0.5% of trustees are under the age of 24. Charities may need to consider adopting new methods of recruitment if they wish to attract trustees from this age group.

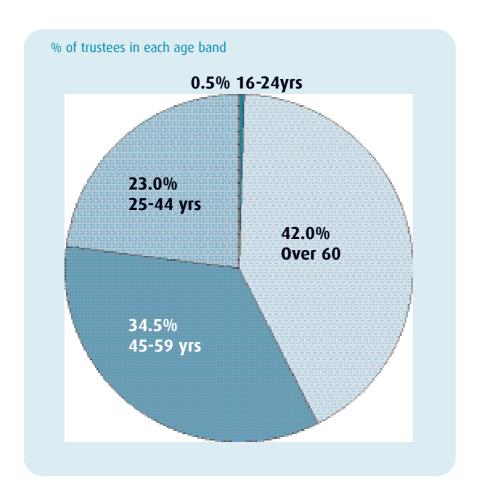
### Details of trustees on the Central Register of Charities

Age band	% of trustees known to be in each age band	% population in each age band <sup>17</sup>
Over 60	42%	21%
45-59	34.5%	19%
25-44	23%	29%
24 and under	0.5%	31%18

<sup>16</sup> This data is based on information we collect annually from registered charities as part of our compliance and data accuracy programme. Individuals' dates of birth are NOT made available to the public.

<sup>17</sup> This data is from the 2001 census, available on the National Statistics website, www.statistics.gov.uk

<sup>18</sup> Clearly not everyone in this age band would be eligible to hold a trustee position. No-one under the age of 18 can be trustee of a charitable trust or unincorporated association. But a person under 18 can be a director of a charitable company.



Charities that wish to attract groups which are currently under-represented on their trustee boards may find they need to think of new ways to engage with those groups. Our research for Village Halls and Community Centres (RS9), for example, indicated that charities were more likely to succeed in recruiting 'young' trustees if the charity itself engaged with young people in its activities.

### **Case study**

This is an example of how a skills audit can be used to identify gaps in a trustee body and so aid the recruitment process.

Age Concern Wakefield District is a medium-sized charity and its purpose is to promote the health and well being of older people in the Wakefield district.

The charity has a comprehensive induction programme which covers many of the principles of good practice highlighted in this report.



Age Concern Wakefield District's Information & Advice Service

It recently carried out a skills audit of the trustee board to identify any gaps in expertise of its trustees.

The audit concluded that the board had a wide spread of experienced trustees, but it would be an advantage to have more financial expertise. The trustees thought this was an ideal opportunity to appoint a professional accountant to the board. They decided to write to local companies in the area inviting suitably qualified people to apply for the vacancy.

A manager of one company they contacted felt this would be an opportunity for one of his staff to help the charity and at the same time broaden that person's accounting experience and knowledge of the voluntary sector. The charity has since appointed this person, who is still in his 20s. By carrying out a skills audit and widening its recruitment methods, the trustee board has gained not only a better balance of skills but also improved its diversity by expanding the range of life experiences and perceptions among those serving as trustees.

Another way to ensure that the charity's board of trustees is truly diverse is to make sure its users or stakeholders are represented. We very much welcome user involvement as a way of helping a charity achieve its aims more effectively. Charities that would like to go down this route should be aware that there is potential for conflicts of interest. Our leaflet Users on Board (CC24) aims to help charities foresee and avoid problems.

We believe that diversity is an important factor for accountability and public confidence. We welcome the growing emphasis by charities on diversity in recruitment of trustees. We propose this as a further reason for charities to seek to rely less on traditional methods of recruitment and more on methods which are inclusive and transparent.

### Describing the role

# Key survey findings

- 42% of large and very large charities now provide job descriptions when preparing to recruit (37% in 2001).
- Only 8% of small charities provide a job description (13% in 2001).

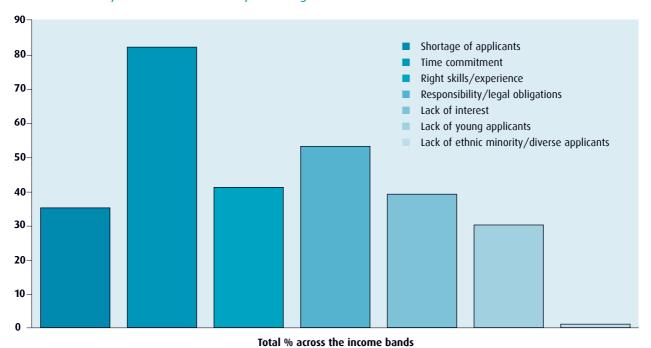
Whether the trustees are personally involved in the day-to-day running of their charity, or have support from a network of employees, they have a unique and key role to play in its management and administration.

Trustees are more likely to be effective from the outset if they have been given a clear idea of the type and extent of their duties and responsibilities.

Among charities taking part in our survey, the most frequent reason given (by 82%) for having difficulty attracting new trustees was that people could not find the time.

However, only 22% of all charities surveyed provided a 'job description' before recruitment. It is reasonable to assume that, if more charities did so, for example stating the number of trustee meetings in the year and the other duties involved, the fear of not having enough time to spend on the charity's business may be alleviated.

### Main reasons why charities have difficulty recruiting new trustees



Fear of the responsibilities and legal liabilities attached to trusteeship was another common difficulty in recruiting, cited by 53% of all charities.

Trusteeship is a responsibility that should be taken seriously. There are indeed cases where trustees have been held personally liable for their actions, but the number is exceedingly small. If trustees act

prudently, lawfully and in accordance with their governing document, then any liabilities they incur as trustees can be met out of the charity's resources. If a charity gets into difficulty through honest mistakes, we will almost always be prepared to work with the trustees to rectify matters.

A charity is more likely to attract prospective trustees if it-

- presents the risks and benefits of trusteeship in a proportionate and balanced manner; and
- gives a fair assessment of the time commitment involved.

### People who are disqualified from acting as trustees

# Key survey findings

- 23% of all charities surveyed make checks on the eligibility of prospective trustees.
- The likelihood of checks being made increases with the size of the charity;
  but even so, less than half of the largest charities do so.

Anecdotal evidence from our Review Visits team suggests that there tends to be a patchy understanding of the disqualification requirements laid down in section 72 of the Charities Act 1993.

Some people are legally disqualified from acting as trustees. It is a criminal offence to serve as a trustee if disqualified from doing so. We therefore expect charities to make eligibility checks on prospective trustees appropriate to their area of operation.

We ask trustees of all new charities seeking registration to sign a declaration that they are not

disqualified. We expect charities to continue to make the necessary checks on prospective trustees to ensure their eligibility. Depending on the charity's circumstances, these checks may be no more complicated than asking new trustees to sign a declaration that they are eligible to act<sup>19</sup>.

However, in charities where the trustees (and volunteers) have direct contact with users who are vulnerable, for example, because of their age or mental health, more vigorous background checks to ensure their suitability are necessary.

<sup>19</sup> You can find a model declaration form on our website in the section on guidance for charities. Other organisations such as NCVO also produce sample trustee declarations of eligibility for new trustees.

### **Case study**

The Charity Commission received information that one of the trustees of a charity on our Register had an unspent conviction for theft. The charity's principal object was the relief of poverty.

We opened a formal inquiry, under section 8 of the Charities Act 1993, and found that only two of the five appointed trustees played an active part in the running of the charity. One of these two had been acting as a trustee while disqualified by section 72 of the Charities Act 1993. The remaining trustees said they were unaware of the charity's activities and did not know what their responsibilities to the charity were.

We were concerned about the administration of charity funds so, as a temporary and protective measure, we froze the charity's bank account.

After making further enquiries, we found that the two active trustees were using the charity to receive housing benefit allowances in respect of properties owned by the two trustees themselves and one other private landlord. The housing benefit was paid to the charity which in turn took a 'donation' from the benefit before passing the rest to the landlord or the tenants. Our view was that some of the charity's funds had been used by the trustees, for travel expenses to landlord's meetings, on business unrelated to the charity. This constituted an unauthorised private benefit.

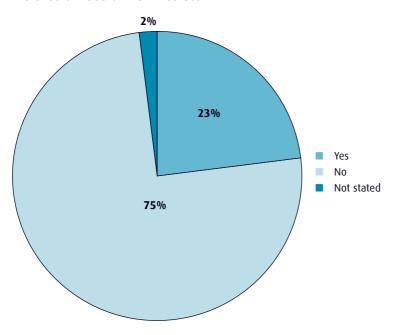
We were informed by one of the active trustees that the charitable status had been sought for reasons other than charitable purposes.

The inquiry concluded that under the circumstances the charity's position was untenable. We therefore removed it from the Register and referred the matter to the police. The individual concerned was found guilty of acting as a trustee while disqualified and supplying false information to the Commission and received a Community Punishment Order.

In certain cases the Charity Commission has the power to grant a waiver and allow a person disqualified from trusteeship under section 72(1) of the Charities Act 1993 to accept a trustee post. We only agree in those cases where the charity can clearly demonstrate that the waiver is in the best interests of the charity.

It is disappointing that only 23% of charities responding to our survey said they carry out checks on the eligibility of prospective trustees to serve on the board.

### Are checks made on new trustees?



Although we know that this can be a sensitive area for trustee bodies, we have seen instances where failure to make these checks has embarrassed the individual and the charity, leading to the inconvenience of undergoing the recruitment process afresh. In extreme cases, the charity's good name, the welfare of its users or even its existence could be at risk.

### Resources<sup>20</sup>

**The essential trustee: what you need to know** (CC3) answers some of the more common questions asked about trusteeship and the duties of trustees.

**Users on Board** (CC24) looks at users who become charity trustees in particular, as this type of involvement raises complex issues that need to be addressed.

**Trustee Recruitment, Selection and Induction,** (RS1) and **Finding New Trustees: What you need to know** (CC30) contain more information about who can and cannot act as a trustee; what charities can do to check that a person is eligible to act; and what steps we take to ensure that those checks have been made.

The **National Council for Voluntary Organisations** (NCVO) provides extensive information and support for charities recruiting, selecting and inducting new trustees. It runs Trustee Bank, a resource to help find or fill trustee vacancies and delivers training on various related topics.

**Involving Young People** and **Recruiting and Supporting Black and Minority Ethnic Trustees,** (both by Tesse Akpeki and published by NCVO) give guidelines on good practice in recruiting young and Black and Minority Ethnic trustees.

The **Trustee and Governance team** at the **NCVO** also deliver a number of different training packages, including "Building an inclusive/diverse trustee board".

"The Law as it affects the Recruitment and Retention of Trustees", Valerie James, appears in **Charities, Governance and the Law: the Way Forward** (Ed Debra Morris and Jean Warburton). This essay gives an analysis of circumstances which may disqualify people from being trustees and the liabilities involved in being a trustee.

<sup>20</sup> This is just a small sample of the guidance and support available. Where not cited here, contact details for all organisations mentioned are in Annex D.

# **Induction**

### Information every new trustee needs

# Key survey findings

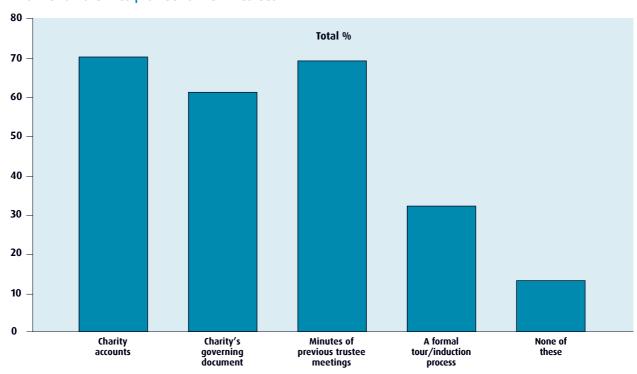
Most charities, including virtually all the larger ones, provide new trustees with some information as part of the induction process:

- 61% of all charities surveyed now routinely give new trustees a copy of the charity's governing document (2001: 55%);
- 69% of all charities surveyed now routinely give new trustees copies of minutes of previous meetings (2001: 63%);
- 32% of all charities surveyed now routinely give new trustees a formal tour or have an induction process (2001: 22%).

Our 2001 survey showed that too many charities were expecting newly recruited trustees to come to terms with the demands of the job without access at the outset to basic information about their charities' activities, finances and constitutional aims and limitations.

We recognise that the requirements for an induction programme will vary depending on the charity's size and nature. However, some form of induction is necessary for every new trustee. All need a clear idea of their duties and responsibilities if they are to make an effective and valuable contribution from the outset.

### Information charities provide for new trustees



Many of our recommended hallmarks of an effective charity depend on the trustees having access to certain basic information. For example, we referred earlier to the fear of perceived legal liabilities resulting from trusteeship. In fact, the greatest risk to individual trustees and their charity comes when trustees do not direct its activities with reference to its governing document.

Trustees need access to this document to ensure that the charity's aims and planned activities are not in breach of trust.

We are pleased to note from our 2004 survey that there has been some improvement in this area, and through our casework we have come across many good practice examples in individual charities.

### **Case study**

"Ensuring that new trustees have an effective induction should not only ensure that the new trustees are retained and do not become disillusioned and leave, but also that they quickly become an effective and useful member of the board of trustees."

London Play, Induction Pack

London Play was set up in 1998 to support and co-ordinate out-of-school play services for children across London. The charity is constantly seeking new ways to support adventure playgrounds, and,



One of London Play's regular meetings.

as one of the Media Trust's chosen projects, is making a recruitment film to attract new members to adventure playground management committees (trustees) as part of its contribution to the Year of the Volunteer 2005.

The charity has put together a comprehensive trustee induction pack for adventure playgrounds to use. It has drawn the pack together from various sources, including Trustee Recruitment, Selection and Induction (RS1). The pack is freely available on its website and is a helpful guide to people who are new to being trustees.

The pack is a comprehensive document which covers every stage of the recruitment and induction process. It tells readers what a trustee is and gives advice on how to make the best of the role. It clearly explains when individuals may be disqualified from being a trustee and how to manage potential conflicts of interest.

The pack includes sample job descriptions and person specifications for board members, chair, secretary and treasurer. It also contains skills and self-assessment monitoring forms so that applicants can consider the qualities they can bring to the charity and the board members can decide the role new members would best be able to carry out.

London Play shows its commitment to diversity by including in the pack an equal opportunity monitoring form and a trustee meeting availability and preference survey.

It also shows commitment to recruiting and retaining trustees through a checklist for a trustee induction pack; a checklist for a new trustee; and suggestions for review meetings between new trustees and the chair.

We would now like to see charities build further on this positive trend, and Finding New Trustees: What you need to know (CC30) gives further guidance on this. New trustees are more likely to feel welcome to the charity, and start making a positive difference sooner if:

- they have immediate access to the charity's aims and objectives;
- they are given a working knowledge of the way the charity operates from the outset.

### Resources<sup>21</sup>

**The essential trustee: what you need to know** (CC3) answers some of the more common questions asked about trusteeship and the duties of trustees.

**Finding New Trustees: What you need to know** (CC30) contains more information about who can and cannot act as a trustee; what charities can do to check that a person is eligible to act; and what steps we take to ensure that those checks have been made.

**The Hallmarks of an Effective Charity** (CC60) focuses on the achievements, performance and impact of an effective charity as well as the principles we expect charities and their trustees to adhere to. These are the overarching principles that our regulatory framework exists to protect and promote, rather than a list of legal requirements. It is mainly designed for charities with an income of £250,000 and above, but recognises that different types and sizes of charities may have different ways of achieving each Hallmark.

You can find London Play's induction pack on its website, www.londonplay.orq.uk.

**Charity Trustee Networks** offers trustees mutual support by encouraging and developing self-help trustee network groups providing cost-effective, peer-to-peer consultancy and mentoring.

<sup>21</sup> This is just a small sample of the guidance and support available. Where not cited here, contact details for all organisations mentioned are in Annex D.

### Training for new trustees

Induction is just the start of the learning process. It should be seen as forming part of a broader agenda of ongoing training for new and existing trustees.

We do not explore this area in detail in this report. However, it is worth noting that organised, formal courses are not the only way for trustees to gain training. Our earlier report said that there is a wealth of guidance and training opportunities available to trustees. We found, though, that a substantial number of charities do not use good practice tools or meet good practice recommendations. Research for our report Milestones: Managing key events in the life of a charity (RS6) found evidence that trustees tended to 'reinvent the wheel' rather than learning from others' experience or taking advantage of the advice and guidance produced by established organisations.

We recommended in our earlier report that there was scope for the development of better and more comprehensive training material for new trustees and others in the basic requirements and skills of trusteeship. Our research for this report has revealed that there have been welcome improvements in this area, not least a forthcoming national hub of expertise in governance<sup>22</sup>; and the Voluntary Sector National Training Organisation's recent successful bid to develop national occupational standards (NOS) in this field.

We have also seen excellent examples of both individual charities and umbrella bodies putting together comprehensive, user-friendly information packs to support both new and existing trustees in the recruitment, selection and induction process.

We are pleased overall with the positive trends we have seen in this area, and look forward to further improvements.

### Resources<sup>23</sup>

The Hallmarks of an Effective Charity (CC60) focuses on the achievements, performance and impact of an effective charity as well as the principles we expect charities and their trustees to adhere to. These are overarching principles rather than a list of legal requirements. The booklet is mainly aimed at charities with an income of £250,000 and above, but recognises that different types and sizes of charities may have different ways of achieving each Hallmark.

The Charity Trustee's Handbook, Mike Eastwood, Directory of Social Change, 2001, is a starter guide for new trustees.

Working For A Charity is a registered charity which aims to increase understanding of the voluntary sector and to encourage new people, resources and skills to join and strengthen the sector. Among other courses, it runs a charity induction course designed to meet the needs of individuals who have recently been appointed to positions of responsibility, whether paid or unpaid.

<sup>22</sup> One of the five national hubs of expertise to support and develop best practice proposed in ChangeUp – Capacity Building and Infrastructure Framework for the Voluntary and Community Sector.

<sup>23</sup> This is just a small sample of the guidance and support available. Where not cited here, contact details for all organisations mentioned are in Annex D.

# **Annex A**

### **Trustee checklist**

The following checklist provides charities with questions they may find useful to consider at the various stages of trustee recruitment, selection and induction. The points have been drawn from our casework experience and from responses to our survey.

Not all points will apply to all types of charity. They should be regarded as a starting point and not the last word on a particular issue.

Trustee recruitment, selection and induction	
Stage one – preparing to recruit	
Do we regularly check our charity's governing document to make sure our recruitment process takes into account any restrictions in it?	
Do we regularly consider whether the restrictions in the governing document are workable?	
If the governing document says that some or all of the trustees must retire after a certain period in office, does the board plan ahead for this loss of skills and experience?	
Do we regularly review the skills, experience and input of our trustees?	
Do we carry out a skills audit of the trustee board to identify any gaps before recruiting new trustees?	
Do we draw up a trustee job description which will give prospective candidates a realistic idea of the duties and time commitment involved in being a trustee?	
Do we think, before recruiting, about what support we will give to new trustees, such as an induction tour or ongoing training?	
Stage two – the recruitment process	
Do we regularly review the methods we use to find new trustees?	
If we sometimes or always have difficulties finding new trustees, do we look at widening our methods of recruitment?	
Do we from time to time review the diversity of the trustee board to make sure it represents its community (whether a geographical community or a community of interest)?	
Do we know when trustees are eligible to act and are not disqualified, for example by charity or company law?	
Do we ask a new trustee to sign a declaration that they are eligible to act as trustee?	
Do we need to conduct Criminal Records Bureau checks on new trustees because our beneficiaries are children or vulnerable adults?	

Stage three – induction	
Do we have an induction process for new trustees which helps them to understand our charitable purposes, financial position and current issues facing the charity?	
Do we give new trustees an information pack or job description outlining their duties and responsibilities so that they are fully aware of their role?	
Do we give new trustees a copy of the charity's governing document?	
Do we give new trustees a copy of the charity's latest accounts?	
Do we give new trustees a copy of the charity's minutes of recent meetings?	
Do we give new trustees copies of the Charity Commission's booklets The essential trustee: what you need to know (CC3) and The Hallmarks of an Effective Charity (CC60)?	
If we are a company, do we make sure that new trustees have an understanding of company law?	
Do we have a procedure to manage potential conflicts of interest and are new trustees made aware of it?	
Stage four – after recruitment	
Do we need to provide further training and development to trustees to ensure that they can continue to make an effective contribution to the charity?	
Do we have a system of evaluation and review so that we can measure the effectiveness of our recruitment and induction procedure?	
Do we keep up to date with Charity Commission guidance and policy news?	

### Annex B

### Research techniques and survey findings

As part of our original research into trustee recruitment, selection and induction practices, we commissioned a postal survey of a random sample of 3,000 registered charities across four income bands. We have again conducted a survey of 3,000 charities, weighted as before across four income bands, to allow a meaningful comparison with our original findings.

We have also analysed data relating to our casework and the trustees' details on our Register.

An independent research company was commissioned to carry out the follow-up postal survey of the trustee recruitment, selection and induction practices in the selected charities. The survey was developed jointly between the Commission and the research company, and was designed so that, wherever possible, meaningful comparisons could be made with the survey in 2001.

The postal survey achieved a 50% response rate, which is high for surveys of this nature. In total, 1,487 completed forms were returned for analysis. This allows a confidence interval exceeding +/-3%, which is industry standard.

### Charity size and proportion sampled

The survey sample was stratified into the following income bands:

Size of charity	Income band	% in total register	% selected for mailing	% in return
Small	£10,000 or less	58	50	47
Medium	£10,001 - £250,000	34	30	31
Large	£250,001 - £999,999	5	10	11
Very large	£1,000,000 +	3	10	11

### Survey findings – trustee recruitment and selection

Some of the results refer to open questions or those where a charity could choose more than one option, so the aggregate score may not equal 100%.

### How difficult is it to recruit new trustees?

Charities were asked to say whether they ever faced difficulty in recruiting and selecting new trustees.

Table 1: Are problems encountered in filling vacancies on the trustee body?

Difficulties faced	Total %	Small %	Medium %	Large %	Very large %
Always	11	10	14.5	14	5
Sometimes	39	32	39.5	46	57
Never	49	56	46	39	38
Not stated	1	2	-	1	-

### What difficulties are experienced in recruiting new trustees?

Charities were asked to say whether they experienced any difficulties when recruiting new trustees.

Table 2: The main reasons why charities experience problems recruiting trustees<sup>24</sup>

Difficulties	Total %	Small %	Medium %	Large %	Very Large %
Shortage of applicants	35	35	39	35	24
Difficult to find people willing to make the time commitment	82	84	86	79	68
Difficult to find people with the right skills/experience	41	21	44	66	72
Difficult to find people who want the responsibility or are willing to take on the legal obligations	53	50	61	59	39
Difficult to find people who are interested	39	46	44	32	9
Difficult to find people who are young	30	32	27	33	30
N/A	1	1	1	-	1

### Is it more difficult to recruit trustees today?

Charities were asked to say whether it was less difficult, about the same or more difficult to fill vacancies on the trustee board now compared to three years ago.

Table 3: How difficult is it to recruit trustees today compared to three years ago?

Difficulty	Total %	Small %	Medium %	Large %	Very large %
Less difficult	7	5	9	13	11
About the same	65	65	65	64	67
More difficult	13	12	15	10	13
Don't know	11	14	7	10	7
N/A	4	5	4	3	2

<sup>24</sup> In our 2001 survey, trustees were prompted to give the main reason they experience difficulty; this time we asked them to state all reasons that applied.

### How do charities attract new trustees?

Charities were asked to state what methods they used to attract new trustees.

Table 4: Methods used to attract new trustees

Methods used	Total %	Small %	Medium %	Large %	Very large %
Advertising in the press	6	3	6	10	15
Networking with other charities	9	3	12	21	19
Use of a trustee brokerage service	1	0.4	2	5	2
Word of mouth and personal recommendation	81	76	84	89	89
Other <sup>25</sup>	12	15	11	8	8

### Do charities use any tools to assist recruitment?

Charities were asked if they carried out any of the following activities to assist the recruitment and selection process.

Table 5: Tools used to assist the recruitment and selection process

Activities	Total %	Small %	Medium %	Large %	Very large %
A skills audit of trustees	17	4	16	38	50
Provide trustee job descriptions	22	8	28	38	46
Use a dedicated recruitment committee	5	2	4	7	16
None of these	67	85	60	43	33
N/A	2	2	1	1	1

### What information are new trustees provided with?

Charities were asked to say whether, as a matter of course, they gave new trustees key pieces of information about the charity.

Table 6: What information do charities provide for new trustees?

Information	Total %	Small %	Medium %	Large %	Very large %
Charity accounts	70	58	73	87	93
Charity's governing document	61	47	66	79	89
Minutes of previous trustee meetings	69	60	72	80	89
A formal tour/induction process	32	15	32	62	75
None of these	13	19	10	4	2

### What checks are made on prospective trustees before appointment?

Charities were asked to say whether they made any checks on prospective trustees before appointment, for example a Criminal Records Bureau check.

Table 7: Are checks made on new trustees?

Are checks made?	Total %	Small %	Medium %	Large %	Very large %
Yes	23	14	27	30	43
No	75	83	71	69	56
Not stated	2	3	2	1	1

### Annex C

### Glossary of terms

A **breach of trust** occurs when trustees act outside the terms of their governing document. A trustee found to be in breach of trust can be held personally responsible for liabilities incurred by or on behalf of the charity, or for making good any loss to the charity.

**Board of trustees** refers to a charity's governing body. This may also be called the management committee, executive committee or board of directors, or may be known by some other title.

**Charity trustees** are the people responsible under the charity's governing document for controlling the management and administration of the charity (section 97(1) of the Charities Act 1993). They may be called trustees, managing trustees, committee members, governors, or directors, or they may be referred to by some other title. In the case of an unincorporated association, the members of the executive or management committee are its charity trustees. In the case of a charitable company, they are the directors.

A **governing document** is any document that sets out the charity's purposes and, usually, how it is to be administered. It may be a trust deed, constitution, memorandum and articles of association, conveyance, will, Royal Charter, scheme of the Commission or other formal document.

A **small charity** is broadly defined in terms of its income. If a charity has an annual income of £10,000 or less recorded on our database in its last full financial year, we will consider it to be a small charity. Almost 100,000 charities in England and Wales fall into this category.

A **user** is anyone who uses or benefits from a charity's services or facilities, whether provided on a voluntary basis or as a contractual service.

### **Annex D**

### **Resources for trustees**

There are many resources that charity trustees can use on recruitment, selection and induction. While this is not a definitive or complete list, it does offer a good overview and a useful starting point.

### The Charity Commission for England and Wales

Responsibility for charities is split between our four offices. Charities with an income of £10,000 or less fall under the responsibility of the Small Charities Unit (SCU) based in the Liverpool office. Further information for charities of any size can be obtained from the Commission at:

London	Liverpool	Newport	Taunton
Harmsworth House 13-15 Bouverie Street London EC4Y 8DP	3rd and 4th Floor 12 Princes Dock Princes Parade Liverpool L3 1DE	8th Floor Clarence House Clarence Place Newport South Wales NP19 7AA	Woodfield House Tangier Taunton Somerset TA1 4BL

### The Charity Commission Contact Centre

provides advice of a general nature on a wide range of issues:

Tel: 0845 300 0218 Minicom: 0845 300 0219

E-mail: enquiries@charitycommission.gsi.gov.uk Website: www.charitycommission.gov.uk

### **Active Communities Unit (ACU)**

The ACU was established by the Home Office to promote the development of the voluntary and community sector and encourage people to become actively involved in their communities, particularly in deprived areas.

### Active Communities Unit

1st Floor, Peel Building 2 Marsham Street London SW1P 4DF

Tel: 020 7035 5328

E-mail: public\_enquiry.acu@homeoffice.gsi.gov.uk

Website: www.homeoffice.gov.uk

### Association of Charitable Foundations (ACF)

ACF promotes and supports the work of charitable grant-making trusts and foundations.

### Association of Charitable Foundations

Central House

14 Upper Woburn Place London WC1H 0AE

Tel: 020 7255 4499 E-mail: acf@acf.org.uk Website: www.acf.org.uk

# Association of Chief Executives of Voluntary Organisations (ACEVO)

ACEVO provides good practice resources and information on sector issues.

### Association of Chief Executives of Voluntary

Organisations 83 Victoria Street London SW1H OHW

Tel: 0845 345 8481 E-mail: info@acevo.org.uk Website: www.acevo.org.uk

### **Business Community Connections (BCC)**

BCC is a charity dedicated to helping other charities obtain more support from business.

### **Business Community Connections**

Gainsborough House 2 Sheen Road Richmond upon Thames Surrey TW9 1AE

Tel: 020 8973 2390

E-mail: info@bcconnections.org.uk Website: www.bcconnections.org.uk

### CR Search and Selection

This is a recruitment and selection consultancy.

### CR Search and Selection

40 Roseberry Avenue London EC1R 4RX

Tel: 020 7833 0770

E-mail: info@crsearchandselection.com

Website: www.crsearch.co.uk

### Charities Aid Foundation (CAF)

CAF helps non-profit organisations in the UK and overseas to increase, manage and administer their resources.

### **Charities Aid Foundation**

25 Kings Hill Avenue Kings Hill West Malling Kent ME19 4TA

Tel: 01732 520 000

E-mail: enquiries@cafonline Website: www.cafonline.org

### **Charity Skills**

Charity Skills provides a specialist database, telephone helplines, seminars and newsletters for its members in the voluntary sector.

### **Charity Skills**

PO Box 43520 London SW15 1WZ

Tel: 0208 785 3327

E-mail: info@charityskills.org Website: www.charityskills.org

### **Charity Trustee Networks**

This charity offers mutual support by encouraging and developing self-help trustee network groups providing cost-effective, peer-to-peer consultancy and mentoring.

### **Charity Trustee Networks**

PO Box 633 Godalming GU8 5ZX

Tel: 01428 682252

E-mail: info@trusteenetworks.org.uk Website: www.trusteenetworks.org.uk

### **Companies House**

All limited companies, including charitable companies, in the UK are registered at Companies House. Seminars for newly appointed directors and company secretaries are provided.

### Cardiff

Crown Way Cardiff CF14 3UZ

### London

PO Box 29019 21 Bloomsbury Street London WC1B 3XD

### Edinburgh

37 Castle Terrace Edinburgh EH1 2EB

Tel: 0870 333 3636

E-mail: enquiries@companies-house.gov.uk Website: www.companieshouse.gov.uk

### Criminal Records Bureau (CRB)

The CRB, an executive agency of the Home Office, was set up to help organisations make safer recruitment decisions. It helps employers identify candidates who may be unsuitable for certain work, especially that involving contact with children or other vulnerable members of society. It provides a Disclosure Service, which offers access to records held by the police.

### Criminal Records Bureau

Customer Services CRB PO Box 110 Liverpool L69 3EF

Tel: 0870 90 90 811

(Disclosure application line: 0870 90 90 844)

Website: www.crb.gov.uk (Disclosure information website:

www.disclosure.gov.uk)

### Directory of Social Change (DSC)

The Directory promotes positive social change and provides a wide range of resources for trustees.

### London

Directory of Social Change 24 Stephenson Way London NW1 2DP Tel 020 7391 4800

### Liverpool

Directory of Social Change Federation House Hope Street Liverpool L1 9BW Tel 0151 708 0117

Tel: 08450 77 77 07

E-mail: (London) info@dsc.org.uk, (Liverpool) north@dsc.org.uk Website: www.dsc.org.uk

### **Ethnic Minority Foundation (EMF)**

EMF develops resources for black and minority ethnic organisations, these include networking and training opportunities and a trustee register.

### **Ethnic Minority Foundation Headquarters**

Boardman House 64 Broadway Stratford London E15 1NG

Tel: 020 8432 0000

E-mail: enquiries@emf-cemvo.co.uk Website: www.ethnicminorityfund.org.uk

# Institute of Chartered Secretaries and Administrators (ICSA)

ICSA provides information and good-practice guidance on governance issues affecting the sector. It also has a register of available trustees to charities that need them.

### Institute of Chartered Secretaries and Administrators

16 Park Crescent London W1B 1 AH

Tel: 020 7580 4741 E-mail: info@icsa.co.uk Website: www.icsa.org.uk

### **Institute of Fundraising**

The Institute of Fundraising aims to promote the highest standards of fund-raising practice.

### Institute of Fundraising

Park Place 12 Lawn Lane London SW8 1UD

Tel: 020 7840 1000

E-mail: enquiries@institute-of-fundraising.org.uk Website: www.institute-of-fundraising.org.uk

# National Association of Councils for Voluntary Service (NACVS)

This is the national umbrella body of Councils for Voluntary Service in England. A local Council for Voluntary Service provides advice, support and information to voluntary organisations and charities in their area, including help with charity registration. The National Association can put charities in touch with their local CVS.

### National Association of Councils for Voluntary Service

177 Arundel Street Sheffield S1 2NU

Tel: 0114 278 6636 E-mail: nacvs@nacvs.org.uk Website: www.nacvs.org.uk

### National Council for Voluntary Organisations (NCVO)

NCVO provides information on fund-raising and governance issues and a range of general support services.

Its website also includes details of a Trustee Brokerage Network Group which is a network of brokerage or placement services who match trustees with vacancies on the boards of voluntary organisations. Members register their brokerage service in a directory and can access trustee recruitment and induction resources at the Trustee Bank website (www.trusteebank.org.uk).

### National Council for Voluntary Organisations

Regent's Wharf 8 All Saints Street London N1 9RL

Tel: 020 7713 6161 Helpdesk: 0800 2798 798 E-mail: ncvo@ncvo-vol.org.uk Website: www.ncvo-vol.orq.uk

### Public Appointments Unit (PAU)

For information about public appointments and public bodies.

### **Public Appointments Unit**

Cabinet Office Admiralty Arch The Mall London SW1A 2WH

Tel: 0845 00 00 040

E-mail:

public.appointments.unit@cabinet-office.x.qsi.gov.uk

Website: www.publicappointments.gov.uk

#### REACH

An organisation that matches the skills of experienced people to the need of voluntary organisations.

### **REACH**

89 Albert Embankment London SE1 7TP

Tel: 0207 582 6543

E-mail: mail@reach-online.org.uk Website: www.reach-online.org.uk

### **VolResource**

This internet-only resource for charities offers quick links to useful organisations concerned with the effective running of charities.

E-mail: info@volresource.org.uk Website: www.volresource.org.uk

### Welsh Council for Voluntary Action (WCVA)

This organisation represents the interests of and campaigns for voluntary organisations, volunteers and communities in Wales. It provides a comprehensive range of information, consultancy, funding, management and training services.

### Welsh Council for Voluntary Action

Baltic House Mount Stuart Square Cardiff Bay Cardiff CF10 5FH

Tel: 0870 607 1666 E-mail: help@wcva.org.uk Website: www.wcva.org.uk

### Journals, magazines and newspapers

### **Charity Finance**

3 Rectory Grove London SW4 0DX

Tel: 020 7819 1200

E-mail: rcoley@charityfinance.co.uk Website: www.charityfinance.co.uk

### **Charities Management**

Mitre House Publishing The Clifton Centre 110 Clifton Street London EC2A 4HD

Tel: 020 854 27766

Website: www.charitiesmanagement.com

### **Charity Times**

Tel: 020 7426 0496 / 0123 Website: www.charitytimes.com

### The Corporate Citizenship Company

This company provides an overview and round-up of current issues, largely through case studies.

E-mail: mail@corporate-citizenship.co.uk

Website:

www.corporate-citizenship.co.uk/publications

### **Network Wales**

Contact WCVA for details

### The Guardian

The Society section in The Guardian is particularly useful.

Website: www.SocietyGuardian.co.uk

### Third Sector

Tel: 020 8606 7500

E-mail: subscriptions@haynet.com Website: www.thirdsector.co.uk

### **Voluntary Sector**

Contact NCVO for details - see above.

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# **Acknowledgments**

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