



Trustee Induction

Category: Recruitment

1. Introduction

1.1. Purpose

To outline the importance of providing new Trustees with an induction and to provide guidance as to what this should include.

2. Requirements of a Trustee

Please refer to the relevant [Trustee Code of Conduct](#) for your county.

3. The Purpose of Trustee Induction

- All committee members including those who are co-opted or invited to join are automatically Trustees. New Trustees may be unaware of this and need to understand their role and responsibilities from the beginning.
- A good induction will reassure committee members that their role is valued, taken seriously and that the committee is run effectively.
- Trustees need to be informed about the Charity Trustee Management Liability Insurance Cover that is provided via the affiliation to the Trust. Information about this is available on the [u3a website](#). New Trustees should be informed of how the committee needs to act to ensure that its actions remain within the requirements of the cover provided.
- Induction enables new Trustees to familiarise themselves with their role, the local u3a, its relationship with the Trust and the wider u3a Movement as well as their legal responsibilities. It will also help to facilitate a level of awareness and understanding of how the u3a operates in line with key policies/procedures.

4. Induction content

Ideally the present incumbent of any role will be available and willing to provide the necessary induction to their successor. If this is not possible another current member of the Committee should take on this role.

The following is a list of information and documents that should be shared as part of any induction process:

- Guidance documents issued by the Charity Commission of each country provide a good overview of what being a trustee involves:
 - England and Wales – [The Essential Trustee](#)
 - Scotland – [Guidance and Good Practice for Chariry Trustees](#)
 - Northern Ireland – [Running your Charity](#)
- A copy of the u3a constitution.

- A copy of the relevant Declaration of Eligibility ([England and Wales](#), [Scotland](#), [Northern Ireland](#)) for a new Trustee to sign which should be retained on file.
- [Principles of the u3a Movement](#)
- Information on the structure of the u3a Movement in the UK including the Region and Networks.
- Minutes of previous committee meetings and AGMs/SGMs.
- A copy of the relevant role description.
- An introduction to the Trust website and, the [advice section](#) of the website which holds the most up to date information and advice for committee members.
- Trustees should be encouraged to sign up to the Trust's monthly [e-newsletter](#) as this contains useful information about the work of the Trust and the wider U3A Movement
- An introduction to the local u3a website and the different ways that the u3a committee communicates with the membership.
- An overview on how different aspects of the u3a are organised e.g. interest groups, monthly meetings, social events etc.
- An overview of the operations of the u3a i.e. how many interest groups there are, the u3a's financial position, how many members there are and how many volunteers.
- Key policy documents
- Dates of future committee meetings and AGMs.

4.1. When should an induction take place?

As soon as possible after the AGM or the person's co-option onto the committee.

4.2. Who should attend?

All new committee members should attend a Trustee induction. It is also encouraged to have as many of the existing committee members there as possible for everyone to meet each other and share information about their roles.

4.3. What else could you do to support new committee members?

An induction is not a one-off meeting, rather a process of a few months to allow a new committee member(s) to settle in. These are some additional ideas of how to welcome and induct new members to a committee:

- Assign a more experienced Trustee as a mentor.
- Encourage new Trustees to ask questions and make suggestions. A fresh pair of eyes can often see new ways of working.
- Encourage Trustees to draw on their experience, as applicable.
- Provide information about the advice and support available from the Third Age Trust, the Regional Trustee, Trust Volunteers, any relevant Networks, and or peer support groups as appropriate.
- Ensure as far as possible that a new Trustee elected to or invited to take on a specific role or responsibility has a detailed handover from the previous incumbent.
- Provide refreshments for the induction so that it has a social aspect as well as covering the formal business.



Related documentation

- [Principles of the u3a Movement](#)
- [Committee Procedures](#)
- [Insurance](#)
- [Finance](#)
- [Terms of Membership of the Trust](#)
- [Trustee Code of Conducts](#)
- [Trustee Responsibilities](#)
- [Model Constitutions](#)
- [Template Policies and Procedures](#)

Support, Advice and Information

The u3a run a number of online workshops to support Trustees, including ‘Running your u3a – Information for Trustees’. More information about these workshops and how to book can be found on the [u3a workshops page](#).

All members can also contact the u3a office for information and advice by calling 020 8466 6139 or emailing: u3a.office@u3a.org.uk.

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Version	Description of changes	Date
2.0	Updated formatting	12/11/2021
3.0	Updated branding and links, edited for clarity.	11/2022