

### **Why bother with induction?**

- not all new committee members realise they are automatically trustees
- it reassures potential nominees/volunteers that they are not just going to be thrown in at the deep end
- it informs trustees before they begin the role that trustee liability insurance is in place
- it acts as a vital gateway enabling new trustees to familiarise themselves with the role, the organisation and their legal responsibilities
- it ensures a level of awareness and understanding of key policies/procedures.

### **The role of a trustee**

A trustee is responsible for the general control and management of his/her U3A and must carry out his/her duties within the context of the governing document i.e. the constitution.

A trustee must

- act in the interests of the U3A
- ensure that it operates in a manner that is consistent with its objects and purposes
- act with care and diligence and in accordance with any legal requirements.

### **What should induction include?**

Essential documents and information would be

- guidance documents issued by the Charity Commission for U3As in England and Wales (The Essential Trustee CC3a/CC3) and OSCR for U3As in Scotland (Guidance for Charity Trustees) which give a good overview, whether registered or not. U3As in Northern Ireland should make use of these documents until such time as they have a version of their own.
- a copy of the U3A constitution (essential)
- a copy of Objects and Principles
- minutes of previous meetings
- a copy of Committee Procedures and any job descriptions
- an overview on how different aspects of the U3A are organised e.g. interest groups/monthly meetings/social events etc.
- key policy documents – trustee code of conduct, disciplinary code
- latest annual report and accounts
- information leaflets and advice sheets on such topics as insurance, data protection
- a copy of the list of resources available from the National Office
- dates of future committee meetings and AGMs

### **When should it take place?**

As soon as practicably possible after your AGM and certainly before the first full committee meeting.

### **Who should attend?**

Your officers should be present but the invitation could be widened to any other member of the committee who might find it useful to attend.

### **What else can you do to help?**

- introduce new trustees to their new colleagues on the board
- assign a more experienced trustee as a mentor
- encourage new constructive ideas
- encourage the trustee to use past experience wherever applicable
- provide information about the advice and support available from the Third Age Trust, the regional trustee, the regional association and the network as appropriate.