

ADVICE SHEET 11 Induction of New U3A Trustees (Committee members) 8 February 2012

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.