

Trustee Induction

WHY BOTHER WITH INDUCTION?

- All committee members including those who are co-opted or invited to join are automatically trustees. However, new trustees are often unaware of this and it is vitally important that they understand their role and responsibilities from the beginning.
- 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 the U3A operates in a manner that is consistent with its charitable 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- what you need to know, what you need to do CC3), OSCR for U3As in Scotland (Guidance & Good Practice for Charity Trustees) and the Charity Commission for Northern Ireland (Running your Charity EGO24) which give a good overview, whether registered or not.
- A copy of the U3A constitution.
- A copy of the relevant Declaration of Eligibility for a new trustee to sign which should be retained on file.
- A copy of the 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 any relevant job description.
- An overview on how different aspects of the U3A are organised e.g. interest groups, monthly meetings, social events etc.
- A list of all existing interest groups and group convenors.
- Key policy documents – trustee code of conduct, disciplinary code.
- Latest annual report and accounts.
- Information 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 ideas.
- Encourage the trustee to use past experience wherever applicable.
- Provide information about the advice and support available from the Third Age Trust, the national website, the regional trustee, the regional association and the network 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.