

Board Health Check, Skills and Training

Board Succession Planning: Induction Checklist

A new trustee must have the opportunity to learn how to carry out their responsibilities and know what support they can expect. A thorough induction process is an essential introduction to your organisation. It should ensure that the new trustee acquires the necessary details of how the organisation and the board works, so that they can play a full part in discussion and decision-making.

An induction plan might include:

- A welcome meeting and tour of the organisation to meet its staff, volunteers and beneficiaries
- A meeting with the directors or trustees to brief the new trustee on what is going on in the organisation, recent key decisions, challenges, and longer-term plans.

Here is a sample Induction Checklist for what a new trustee needs to know. Ask other trustees what they would have liked to know when they joined. Consider teaming up the new trustee with an experienced trustee for a mentoring period. By meeting up briefly before meetings to go through the agenda and sitting together at meetings, the learning curve for the new trustee can be shortened.

Key documents	Date provided	Received
Constitution (or governing document)		
Recent annual report and accounts		
Overview of current financial position		
Recent minutes of board meetings		
Dates of next board meetings/other key dates		
Details of any sub-committees		
Copy of code of conduct		
Copy of register of interests, to be completed and returned		
Consent form and declaration, to be signed and returned		
Copy of OSCR Guidance for Charity Trustees (if a charity)		
Expenses policy and claim form		
Outline of board members' roles and responsibilities		
List of main sources of funding (including fundraising contracts)		
Risk register		
Complaints policy		

Organisational information	Date provided	Received
Mission statement		
Brief history of the organisation		
Organisation/staff structure		
Contact details of board members and key personnel		
Policies which apply to the board (e.g. equal opportunities, social media)		
Job description of chief executive or key staff/volunteers		
Business or strategic plan		
Newsletters, promotional materials		
List of key stakeholders		