**Trustee Induction**

**Almshouse Association Model Policy**

**Introduction**

Trustees are legally responsible for the charity and all work that it undertakes. Trustees are legally responsible for the charity and everything the charity does is the responsibility of the trustees. It is the responsibility of the chairman of trustees to have plans in place for his or her successor, but also to have a succession plan for the entire trustee body as an agenda item for discussion at least annually.

The induction of a new trustee fully prepares him or her for their future role and ensures that he or she serves their full term successfully.

New trustees are more likely to feel welcome to the charity and start making a positive difference sooner if:

* they are given a working knowledge of the way the charity operates from the outset
* they are clear as to the charity’s aims and objectives.

In order to operate successfully, the charity should have a formal induction policy in place for whenever a new trustee is appointed. The policy covers the induction process and any requirement to provide further training.

**Trustee Induction Policy**

All trustees have duties and responsibilities under the law. To be effective every trustee needs to be familiar with:

* His or her legal duties and responsibilities as a trustee
* The charity’s purposes, policies, constitutional arrangements and finances.

Before a new trustee accepts the appointment to an almshouse charity, the clerk to the trustees or the chairman will provide the new trustee with a briefing pack containing most, if not all, of the following:

* The charity’s governing document (which may be a number of documents)
* A copy of the charity’s’ audited Annual Report and Accounts
* A copy of the current year’s budget and management accounts if applicable
* A copy of the almshouse charity’s minutes of recent meetings
* \* The Charity Commission’s guidance on *The Essential Trustee: What you need to know*[ [*https://www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3*](https://www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3) *]*
* \* The Charity Governance Code [ <https://www.charitygovernancecode.org/en> ]
* A precis of the charity’s history
* A forecast of future meetings of trustees and events with which they may be involved
* List of fellow trustees with a thumbnail CV and their present duties within the charity
* A copy of the latest Quinquennial Inspection Report (Stock Condition Survey) on the almshouses
* A copy of the list of residents with their date of appointment (Data Protection Act compliant)
* Copy of any current policies (Health and Safety, Safeguarding, Equality and Diversity etc.)
* Copy of the Residents’ Handbook
* Information about The Almshouse Association and how to access the members’ pages of the Association’s website.

**Note:** \* Charity Commission publications can be downloaded from [www.charitycommission.gov.uk](http://www.charitycommission.gov.uk)

The new trustee will wish to know how the aims of the charity are implemented and the following will be arranged:

**1 Tour of the almshouse site(s)**

Accompanied by the chairman or another trustee and/or the clerk, the new trustee will visit the almshouses and any communal areas. The new trustee will be briefed on any current maintenance issues and any proposed future works.

**2 Meet the residents**

Arrangements will be made for the new trustee to visit and meet some of the residents. The new trustee will be accompanied by a fellow trustee in order to overcome any limitations of DBS checks. The new trustee will be given brief details of the residents’ current circumstances prior to the meeting.

For larger charities, meeting some residents at a coffee morning may be more appropriate. The new trustee should be taken to visit a selection of the charity’s properties.

**3 Meet staff, volunteers and trust officers**

Arrangements will be made for the new trustee to meet the charity’s officers and staff.

**Signing the minute book**

The new trustee will be asked to sign the minute book to denote his/her willingness to act as a trustee.

**This policy has been approved for issue by the board of trustees of (name of charity)**

Signature: ...........................................................................................................................................

Name: ...........................................................................................................................................

Date: ...........................................................................................................................................