**Notes for interviewing a prospective trustee**

*This Almshouse Association template is a guide and does not constitute advice. Each interviewer should complete the table overleaf for each applicant. Complete the notes and score columns. After interviewing all applicants use this information, perhaps using an amalgamated score grid, to evaluate all applicants scores.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Applicants Name** |  | **Interviewers’ Names** |  |

The purpose of the interview is to:

* allow all parties to share information.
* learn about the applicant
* inform the applicant about the trust, the almshouse movement, the charity and the trustee role
* answer any questions from the applicant.

1. **Introduction**

Please introduce yourselves to the applicant.

Interviewers should be objective and not make comments that may lead the applicant to believe the interviewer is making a judgement or pre-judging the applicant’s case. The interviewers must be non-committal as to the applicant’s chances and, if questioned, should refer to there being several applicants who all will have the same priority level considered.

1. **The process / selection**

Advise the applicant that the decision to appoint is based on various criteria (role profile and skills gap analysis) and the applicant with the best fit will be selected. The final decision is made by the trustees and the applicant will be informed as soon as possible.

1. **Questions**

As the applicant may be nervous, it is best to start with a question about how they travelled to the meeting place.

| **Question** | **Notes** | **0**  **Failed to answer** | **1**  **Met few expectations** | **2**  **Met expectations** |
| --- | --- | --- | --- | --- |
| **1. Please tell us about yourself and your background**  Is the applicant’s background, work experience etc. relevant to the role and the board’s needs? This will draw out relevant skills. |  |  |  |  |
| **2. What do you know about the almshouse movement?**  If the candidate does not know anything, fill in the gaps for them, perhaps providing a handout for them to take away (see ‘What are almshouses’ at the end of this document) |  |  |  |  |
| **3. What attracted you to this role and why are you particularly interested in this charity?**  Does the applicant indicate having a genuine interest in the work of the charity and a desire to contribute to their local community? Do they demonstrate a basic understanding of the charity’s work and what a trustee’s role involves? Do they come across as being enthusiastic about making a meaningful contribution? |  |  |  |  |
| **4. What personal qualities do you think a trustee needs to have and which personal qualities would you bring to the role?**  Examples might be commitment, reliability, integrity, diplomacy, an effective team player etc. |  |  |  |  |
| **5. What particular skills do you feel you would bring to this role?**  Hopefully the answer will demonstrate that the applicant has read and understood the role description and that they have considered how their skills and qualities would be relevant and benefit the charity. Does the applicant demonstrate self-awareness? This is an opportunity to share other skills which may not be in the person specification but nevertheless could be relevant and beneficial. |  |  |  |  |
| **6. Do you have experience of collective leadership either as a Board member or in a different capacity? If so, what role did you play?**  You may wish to ascertain that the applicant is a team player, comfortable having collective responsibility and contributing to decision making. |  |  |  |  |

Depending on the skills you are looking for you can pick from these questions below. Remember not to overwhelm your applicant, this is an unpaid trustee role.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **7. Can you recall an occasion when you contributed to a challenging group discussion? What approach did you take? How effective was your input and approach?**  Does the applicant demonstrate an ability to listen to the views of others and make a valuable contribution to the conversation in order to help achieve the best possible outcome for the charity? |  | |  |  |  |
| **8. Based on your understanding of the charity and the role of a trustee, what do you believe might be the biggest risks and opportunities we are facing?**  You will know your current risks and opportunities. |  | |  |  |  |
| **9. How do you think the trustees could tackle these challenges and opportunities?**  Again, the answer will show whether the applicant has researched the charity, understood the role of a trustee and fully read the role description. Can they balance risk and opportunity? |  | |  |  |  |
| **10. Please imagine a situation in which the Chair presents an option to the trustees that you are in favour of, but the rest of the trustees wish to reject. How would you approach the situation?**  Guage whether the applicant can work effectively as a board member and whether they are able to show diplomacy and persuasiveness in such situations. |  | |  |  |  |
| **Question** | | **Notes** | **0**  **Failed to answer** | **1**  **Met few expectations** | **2**  **Met expectations** |
| **11. Our Board of trustees meets X times a year, usually in person or, on occasions, remotely. Trustees need to allow time to read Board papers and prepare for meetings. Are you comfortable with these commitments? Are there any aspects of this that are likely to cause you difficulty in any way?**  You would wish to ascertain that there are no practical reasons why the individual cannot meet the commitment required.  **What is the best day / time for meetings for you?** |  | |  |  |  |
| **12. What, if any, training, support, or development do you feel you may need to fulfil this role to the best of your abilities?**  A good induction is, of course, the essential starting point but there may be specific areas in which the applicant would welcome support. |  | |  |  |  |
| **13. What do you understand are the differences between corporate and charity finance?** |  | |  |  |  |
| **14. Tell us a bit about your outside interest and hobbies?** |  | |  |  |  |
| **Total** | | |  |  |  |
| **Grand Total** | | |  | | |

1. **Questions from the applicant**

Allow the applicant the opportunity to ask questions.

*This information could be in your applicant pack.*

**“What are almshouses?”**

Ever found yourself struggling to explain almshouses? Here are some key messages:

* The aim of almshouse charities is to provide warm, safe, secure homes at an affordable cost for local people in housing need.
* Almshouses have been in existence for over 1000 years. Today over 1,600 almshouse charities provide homes to more than 36,000 people in need.
* Most almshouse charities are small with no more than 20 dwellings.
* Almshouses are established by gift or legacy and run by volunteers.
* Almshouse charities are recognised for nurturing community living where residents can call upon neighbours and trustees when needed, whilst also retaining their independence.
* Research has shown that almshouses have a huge effect on combating loneliness and isolation and improve well-being.
* In some rural areas almshouses are the only form of social housing.

Almshouses are the oldest form of charitable, low-cost, community housing for local people in housing need. The architectural design and implied spirit of almshouses promotes neighbourliness and well-being by reducing isolation and loneliness, yet they still allow independent living. They are micro-communities that offer companionship and remain a permanent part of the community in perpetuity so that futures generations of those in housing need will have a warm, safe place to call home in their local community.

Almshouses were developed through independent philanthropic giving and still rely on volunteers to run them today. Residents pay a weekly maintenance contribution set at a level well below market rents in the area. This helps towards the cost of ongoing maintenance, however, to ensure the almshouses are fit for 21st-century living additional funds are often needed to cover the costs.

Almshouses represent some of the most significant historic buildings in our villages, towns and cities. The charities take great care to maintain and protect our national heritage.

Charities often need support in developing long term plans, helping their residents and training their volunteers and staff with CPD accredited training, expert guidance on all management matters, protection and representation in Government and on the national stage.

The Almshouse Association, which acts as an umbrella membership organisation for nearly 1,600 charities, was established by members to represent, train, support, and guide almshouse charities. The Association also offers loans and grants to the charities to assist with the cost of new build or to enable them to refurbish and modernise the almshouse dwellings.