**Trustee Induction Check List**

*This Almshouse Association template is a guide and does not constitute advice.*

Trustee Name……………………………………………..

All trustees have duties and responsibilities under 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.

New trustees should receive the following to complete their trustee induction:

|  |  |  |  |
| --- | --- | --- | --- |
| **Complete this table with the charity’s key information, as applicable** | | Charity’s Registered Address |  |
| Charity Commission No. |  | Companies House No. |  |
| Almshouse Association No. |  | CQC No. |  |
| Regulator of Social Housing No. |  | Charity Structure  *(delete where not applicable)* | Trust / Unincorporated / Company Limited by Guarantee / Charitable Incorporated Organisation |

*The who’s responsible column could be allocated to other trustees, the CEO, the clerk, the warden or other suitable members of staff. The charity should tick off each task when completed and the new trustee should do the same to acknowledge this. Feel free to add other tasks at the end of this template.*

| **Task** | **Who’s responsible** | **Charity** | **New Trustee** |
| --- | --- | --- | --- |
| Meet the Chair / CEO  Meet the other trustees | Chair / CEO |  |  |
| Visit the almshouses and other facilities and services provided by the charity and meet the residents | Chair / CEO |  |  |
| Receive and read the governing document | Clerk |  |  |
| Receive and read The Charity Commission’s guidance on The Essential Trustee: What you need to know. ([www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3](http://www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3) ] | Clerk |  |  |
| Receive and read The Charity Governance Code  [ [www.charitygovernancecode.org/en](http://www.charitygovernancecode.org/en) ] | Clerk |  |  |
| Receive a copy of the latest Annual Report and respond to any question raised. | Clerk |  |  |
| Receive a copy of the budget and current accounts | Finance Trustee |  |  |
| Provide a copy of the most recent trustee meeting minutes | Clerk |  |  |
| Provide confirmed dates for future meetings and any other events the need to be involved in | Clerk |  |  |
| Provide a precis of the charity’s history. Direct to the charity website with a web address. | Clerk |  |  |
| Provide a list of other trustees, their contact details, their roles and responsibilities and any relevant organisation chart | Clerk |  |  |
| Provide a list of residents and their contact details | Clerk |  |  |
| Provide a copy of current policies including GDPR policy. Direct them to where documents are held. | Clerk |  |  |
| Issue your charity Code of Conduct for their signature. | Clerk |  |  |
| Copy of Residents Handbook - Direct them to where documents are held | Clerk |  |  |
| Provide information about The Almshouse Association and how to access the members’ pages of the Association’s website. | Clerk |  |  |
| Ensure Safeguard Training takes place | Clerk |  |  |
| Apply for a DBS check | Clerk |  |  |
| Meet other trustees, volunteers and all staff as applicable | Allocate as appropriate |  |  |
| Introduction of any professional service providers (as appropriate) | Allocate as appropriate |  |  |
| A copy of the latest Quinquennial Inspection Report (Stock Condition Survey) on the almshouses | Allocate as appropriate |  |  |
| Provide access to your cloud storage systema and email address | If charity has this. |  |  |

|  |  |
| --- | --- |
| Date Completed |  |
| Signed by Trustee |  |
| Signed by Chair |  |