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New Trustees Welcome & Induction Pack

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This is a complementary resource to support the Trustees Good Governance Handbook. Its purpose is to professionally welcome and induct new Trustees into the organisation - and ensure that all the important documentation pertaining to their role is completed promptly, many of which require signing and returning for filing. The contents of this pack must be read in conjunction with Trustees Good Governance Handbook and which will need to be provided to part of their induction. The New Trustees Welcome & Induction Pack provides the following resources:

Welcome Letter and thank you for agreeing to serve as a Trustee: This letter welcomes and demonstrates the organisation's commitment to support its newly appointed Trustees.

Agreement to Serve as a Trustee: This agreement sets out some core understandings of the responsibilities of serving as a Trustee and how they will be supported by the organisation in their role. This is not a legally binding contract and the individual can cease serving as a Trustee at any time by resigning from the Board. All Trustees willing to serve each year will be asked to sign a new agreement annually.

Trustees Contact & Personal Information Form: This form ensures that the organisation has the basic and pertinent personal information on record that it is appropriate to keep relating to a Trustee. Trustees will be asked to review and update this information annually - and of course should provide any updates as soon as there are any changes to the information previously provided.

Code of Conduct for Trustees: This Code of Conduct exists to underpin the principles of good governance. All Trustees are asked to agree to abide by this Code when agreeing to serve as a Trustee. As stated in the Code of Conduct, this code does not constitute a list of a Trustees legal duties, but it is none the less fully consistent with the relevant legal principles of Company and Charity law.

Trustees Fit & Proper Persons Declaration: It is a statutory requirement that all Trustees are fit and proper persons to serve on a Board. This section of the Welcome & Induction Pack offers guidance about the declaration, as well as providing the statutory HMRC statements that every Trustee is required to declare against. In addition to this initial declaration, Trustees are required to keep their Fit & Proper Persons Declaration updated - as and when changes occur - as well as making a new declaration every 12 months, regardless of whether any changes having occurred or not.

Trustees Declaration of Interests Form: It is a requirement of being a Trustee, that every new Board member completes a Declaration of Interests Form at commencement of their trusteeship with the organisation. In addition to this initial declaration, Trustees are required to keep their Declaration of Interests Form updated - as and when changes occur - as well as making a new declaration every 12 months, regardless of whether any changes having occurred or not.

Trustee Job Description: Included in this Welcome & Induction Pack is the core job description for the role of a Trustee. In addition to the role of a Trustee, Board members may also undertake additional responsibilities - perhaps by being nominated for Chair or Treasurer, or by serving on sub-committees. The Trustees Good Governance Handbook helpfully includes additional Trustee job descriptions.

Trustees Induction Checklist: An induction is essential to assist in the smooth transition to becoming an effective Trustee, as well as being required for health and safety reasons for all persons that will be on the organisations premises. The Trustee Induction Checklist ensures that a simple and time effective method is in place to professionally induct new Board members.

Trustees Self Appraisal of Personal Effectiveness: The final document in this Welcome & Induction Pack is a copy of the Trustees Self Appraisal of Personal Effectiveness form for the Good Governance Handbook. This reinforces that the organisation is committed to ensuring that all Trustees have the opportunity to review their contribution - and that the time they generously give continues to prove mutually beneficial.

This New Trustees Welcome & Induction Pack is a free bonus to all clients that purchase the Trustees Good Governance Handbook!

Maintain an unbroken HR Support & Advice Contract with HR Performance and you'll receive every updates to this resource without any additional costs!