

Onboarding, induction & ongoing support

Introduction

Being a trustee requires skill, and support. It's vital that members joining your Board are provided with information and have a proper induction plan. This could include buddying them with another Board member, arranging conversations with key staff, service visits, and training on the role of being a trustee. This would also include ongoing review, coaching and appraisal from the Chair as necessary.

<https://trusteesweek.org/training/>

Onboarding

The process of bringing in a new trustee doesn't end with appointment. Good onboarding is essential and it needs to consider the particular needs of the individual. This might be in relation to particular skills training, or it might be in relation to making adjustments to the way the Board meetings are run to ensure that you are inclusive and considering candidate needs.

Timeline

Ongoing

Inclusive recruitment

The goal of an inclusive onboarding experience is to make Trustees feel welcomed and valued, whilst also addressing existing barriers to, accessibility and inclusion.

Having people from a range of backgrounds means that Boards need to consider different needs, and this can mean reviewing how the Board works. This could be in relation to where and when the Board meets and if this is convenient to people with different commitments and responsibilities, to how accessible are the materials and Board papers.

Recruitment in action

Ensure that you maintain engagement with your candidates between appointment and when they start.

Having a conversation with new trustees early about what their needs, preferences and constraints are will be an important way to demonstrate genuine commitment to diversity and inclusion. Questions could include

- What are your access needs?
- What is your availability to attend meetings? Are you in full-time work or education?
- Do you have any care commitments?
- What are your digital inclusion needs? Are you able to attend virtual meetings? Do you have a stable internet connection?
- Have induction activities planned for them, with introductory reading and any training set up for them.

Quote

It doesn't stop there - post placement the team have continued to keep in touch and become real allies for me

Andi Jarvis, Network Member

Measuring success

Successful onboarding is all about ensuring that trustees feel equipped in terms of understanding their role, how they can add value and crucially, feeling comfortable in contributing their opinions and perspective.

The role of the Chair is key in developing a Board culture and dynamic where candidates feel that they are able to challenge, and provide their perspective in a safe and inclusive environment. This is likely to result in higher levels of retention when candidates have been supported through training and mentoring, and feel valued for the skills and experience they bring to the Board.

Expert help

At this stage, the search partner will play a very light touch role. However, they can provide guidance on what will help in terms of onboarding, and will also continue to engage with and support the candidate after they have been placed. This can help to identify any issues or areas of concern that the candidate may raise, and provide the appropriate support.