



CULTURE, HERITAGE & ARTS ASSEMBLY.

ARGYLL & ISLES

Trustee Induction Checklist

New board members must have the opportunity to learn how to carry out their responsibilities and know what support they can expect. A thorough induction process is an essential introduction to the organisation. It aims to ensure that each new member acquires the necessary detail of how the organisation and the governing body works, so that they can play a full part in discussion and decision-making.

CHARTS induction plan includes:

- a meeting with a small group of trustees, including the Chair, to brief the new member on what is going on in the organisation, recent key decisions, challenges, and longer-term plans.
- a welcome meeting and meeting with staff

It's is possible for new members to team up with an existing member for one year: by meeting up briefly before meetings to go through the agenda and sitting together at meetings, the learning curve for new members can be shortened.

Key documents	Date provided	Received
Governing documents		
Recent annual report and accounts		
Overview of current financial position of the organisation		
Recent Minutes of committee meetings		
Dates of next committee meetings/other key dates		
Details of any subcommittees		
Copy of Conflict of Interest Policy - code of conduct		
Copy of register of interests, to be completed and returned		
Consent form and declaration, to be signed and returned		
Copy of OSCR Guidance for Charity Trustees (if a charity)		
Expenses policy and claim form		
Outline of board members' roles and responsibilities		
List of main sources of funding (including fundraising contracts) – delivery plan		
Risk register		
Complaints Policy		
Organisational Information		
Business Plan		
Brief history of the organisation		
Organisation/staff structure		
Contact details of board members and key personnel		
Policies which apply to the board		
Job description/contract of chief executive or key staff/volunteers		