

Tiptree U3A Trustee Induction Policy

To aid any member who might be considering joining the committee Tiptree U3A have prepared a booklet "Thinking of Being a Trustee?". The aim of the booklet is to give some information that may assist the member to make an informed decision about becoming a trustee.

NEW TRUSTEES

WHY AN INDUCTION IS IMPORTANT?

- All committee members including those who are co-opted or invited to join are automatically trustees. However, new trustees are often unaware of this and it is vitally important that they understand their role and responsibilities from the beginning.
- It reassures potential nominees/volunteers that they are not just going to be thrown in at the deep end.
- It informs trustees before they begin the role that trustee liability insurance is in place.
- It acts as a vital gateway enabling new trustees to familiarise themselves with the role, the organisation and their legal responsibilities.
- It ensures a level of awareness and understanding of key policies/procedures.

THE ROLE OF A TRUSTEE

A trustee is responsible for the general control and management of his/her U3A and must carry out his/her duties within the context of the governing document i.e. the constitution.

A trustee must:

- Act in the interests of the U3A.
- Ensure that the U3A operates in a manner that is consistent with its charitable objects and purposes.
- Act with care and diligence and in accordance with any legal requirements.

WHAT WOULD THE INDUCTION INCLUDE?

Access to copies of

- Essential documents Guidance documents issued by the Charity Commission for U3As in England and Wales (The Essential Trustee- what you need to know, what you need to do CC3), OSCR for U3As in Scotland (Guidance & Good Practice for Charity Trustees) and the Charity Commission for Northern Ireland (Running your Charity EGO24) which give a good overview, whether registered or not.
- Tiptree U3A constitution.
- Declaration of Eligibility for a new trustee to sign which should be retained on file.
- Principles of the U3A Movement
- Any relevant job description
- All Key policy documents including trustee code of conduct, disciplinary code

Tiptree U3A Trustee Induction Policy

- Minutes of previous committee meetings and AGMs/SGMs.

Information regarding

- An overview on how different aspects of the U3A are organised e.g. interest groups, monthly meetings, social events etc.
- Existing interest groups and group convenors.
- Latest annual report and accounts.
- Topics such as insurance, data protection.
- Detail of the structure of the U3A Movement in the UK including the region and networks.
- Resources available from the National Office.
- The advice and support available from the Third Age Trust, the national website, the regional trustee, the regional association and the network as appropriate.
- Dates of future committee meetings and AGMs.

WHEN WOULD IT TAKE PLACE?

As soon as practicably possible after our AGM or the co-option onto the committee, and before the next committee meeting.

WHO SHOULD ATTEND?

The officers and any other member of the committee who assistance would be beneficial

OTHER SUPPORT

- Introduce new trustees to their new colleagues on our Committee.
- Assign a more experienced trustee as a mentor, if required.
- Encourage new ideas.
- Encourage the trustee to use past experience wherever applicable.
- Ensure as far as possible that a new trustee elected to or invited to take on a specific role or responsibility has a detailed handover from the previous incumbent.