

Trustee Recruitment Toolkit



Formality checklist

Things to do	Have you	Done	To do
Take up references	made sure that references have been included		
	if there are none, chase up the applicant		
	made a phone call to the referee in order to discuss the new trustee and clear up any questions or concerns		
Check that the candidate is eligible to be a trustee	made sure the candidate has signed the form confirming that s/he is eligible		
	searched the register of disqualified directors at Companies House (if appropriate)		
	requested to see the Charity Commission register of those removed as charity trustees (if appropriate)		
	obtained a disclosure from the Criminal Records Bureau if your organisation works with children or vulnerable adults (disclosures for volunteers, such as trustees, are free)		
Confirm the appointment in writing	included information and dates on the induction programme		
	sent an induction pack (see Step 9: Induct your Trustee for details)		
	sent an eligibility declaration form to be signed and returned to you		
	indicated that the appointment is probationary if appropriate		
	or indicated that the appointment is to observe in the first instance		
	or indicated that the appointment is for full trustee position		

