

BUCKINGHAM ALMSHOUSES AND WELFARE CHARITY

Trustee Induction Policy

1. Policy Statement

To continue to improve and update the compliance and governance requirements of the Buckingham Almshouses and Welfare Charity (BAWC), it is policy that all newly appointed trustees should undergo an induction programme.

2. Purpose

This policy is designed to provide the essential elements of an induction policy.

3. Scope

This policy applies to new and, as a one-off, existing trustees.

4. Context

Traditionally, newly appointed trustees have merely taken up their role without any formal, or even informal, training. It is recognised now that to enhance their skills and provide an improved service to their colleagues on the Board of trustees and to the Charity itself, trustees should undergo a programme of training and induction to better equip them with a greater understanding of the Charity's role and functioning.

5. Areas to be covered

- Be familiar with the general legal duties and responsibilities of a trustee.
- Be familiar with the Charity's aims and objectives and achieve a working knowledge of how the Charity operates.
- Be made aware of the Charity's history.
- Receive a downloadable copy of the Charity Commission's guidance on '*The Essential Trustee: what you need to know*' and of '*The Hallmarks of an Effective Charity*' (both downloadable from www.charitycommission.gov.uk).
- Become familiar with The Almshouse Association (www.almshouses.org) and receive a downloadable copy of its publication '*Standards of Almshouse Management*'.
- Receive a copy of the Constitution of the Buckingham Almshouses and Welfare Charity as a Charitable Incorporated Institution (CIO).
- Receive copies of the policies of BAWC – and sign to confirm having read them.
- Sign a Declaration of Interest form.
- Be familiar with the Charity's criteria for residency in an almshouse and with the process for selecting an applicant for residency by use of Bucks Home Choice.
- Receive a list of fellow trustees with a brief CV of each trustee and their current role(s).

- Receive a copy of the Charity’s last Quinquennial Report on the almshouses.
- Understand the Charity’s financial arrangements, receive a copy of the Charity’s last audited Annual Report and Accounts and of the Charity’s current year’s budget, and meet the chair of the Finance Committee.
- Receive copies of the minutes of the Board’s last four meetings.
- Undergo safeguarding training.
- Join one or more of the Charity’s committees.
- Meet with the chair of the Board and the secretary.
- Make visits to the Charity’s almshouses and meet some of the residents.
- Make visits to the Charity’s additional properties – currently Gawcott allotments, Hodding Wood and the Poor’s allotments.
- Sign the minute book on the occasion of the new appointee’s first Board meeting.

Document Control

Name of Policy:	Trustee Induction Policy
Version:	v.2
Purpose of Policy:	To provide a programme for inducting new trustees, to cover the purpose, scope and context of such an Induction Policy and to set out the areas induction must cover.
Associated Document:	Induction Checklist for completion 3 months after appointment
Policy applies to:	Newly appointed trustees
Approved by:	The Compliance and Governance Committee
Responsible for its updating:	The Compliance and Governance Committee
Final approval by:	The Board of BAWC
Date of approval:	21 st January 2021
Policy first issued:	July 2019
Proposed date of next review:	December 2023