

Trustee Induction

This induction seeks to provide Trustees of Ilkeston u3a with guidance and information about their role and legal responsibilities.

The Purpose of Trustee Induction

All committee members whether they are elected or co-opted are automatically Trustees.

A good induction will reassure committee members that their role is valued, taken seriously and that the committee is run effectively.

Trustees need to understand the Charity Trustee Management Liability Insurance Cover that is provided via the affiliation to the Trust. Information about this is available on the u3a website. Trustees should be aware of how the committee needs to act to ensure that its actions remain within the requirements of the cover provided.

Induction enables new Trustees to familiarise themselves with their role, Ilkeston u3a, its relationship with the Trust and the wider u3a Movement, as well as their legal responsibilities. It will also help to facilitate a level of awareness and understanding of how the u3a operates in line with key policies and procedures.

Induction

An ideal induction is a process, often over a few months, to allow a new Trustee to settle in. The checklist is intended to help map progress. Trustee induction should include, but is not restricted to:

- one to one handover from the previous incumbent to the new incumbent
- reading and absorbing suggested key documents
- gaining an understanding of how Ilkeston u3a is organised and operates
- exploration of u3a Trust website, particularly the Advice Section which requires a registration
- attendance at recommended zoom workshops, conducted by u3a Trust.



Key documents suggested for personal reading to enhance your Trustee role within u3a

- Charity Commission: [The Essential Trustee](#)
- [Declaration of Eligibility](#) (which Trustees will be asked to sign annually)
- [Principles of the u3a Movement](#)
- [Terms of Membership of u3a Trust](#) (download to view)
- [Trustee Code of Conduct](#) (download to view)
- [Insurance Cover Note](#); [Insurance Overview](#); & [Insurance FAQs](#),
- [Ilkeston u3a Constitution](#)
- [Ilkeston u3a Policies and Procedures](#)
- Role Descriptions

Recommended u3a Zoom Workshops (book via u3a.org.uk)

- Running your u3a
- Keeping it Legal
- Equality, Diversity & Inclusion
- Growth Matters
- Recruiting and Valuing Volunteers
- Finance Matters

[u3a Trust](#) has a wealth of advice and guidance documents, under the *Support for u3as* tab, which can be explored or referred to at any time, or as the need arises.

Alternatively Trustees can contact the u3a office for information and advice by calling 020 8466 6139 or emailing: u3a.office@u3a.org.uk

| u3a Trustee Induction | | | |
|-----------------------|--|-----------------------------------|---------------|
| Version | Description of changes | Date | Review Date |
| Issue 1 | Document created | Approved & adopted September 2023 | February 2024 |
| Issue 2 | Document checklist improved. Relevant role description and <i>Committee Team: key responsibilities</i> summary sheet to be included with pack. | Approved & adopted March 2024 | February 2025 |



TRUSTEE INDUCTION CHECKLIST

| Learning | Completed | Your Notes |
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| Handover from previous Role Holder | | |
| Assigned Mentor | Name: | Mentor's contact details: |
| Key Documents | | |
| Charity Commission: The Essential Trustee | | |
| Declaration of Eligibility | Date signed: | Business Secretary will retain this document |
| u3a.org.uk: The Principles of the u3a Movement | | |
| Terms of Membership of u3a Trust | | |
| Structure of u3a movement | | |
| Trustee Code of Conduct | | |
| Role Descriptions | | |
| Insurance Cover note | | |
| Insurance Overview | | |
| Insurance Frequently Asked Questions (FAQ) | | |

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| u3a Workshops: | <p><i>These recommended workshops are run by u3a Trust online, via Zoom. They are free, and about 2-3 hours long.</i></p> <p><i>Browse available dates and reserve a place via https://www.u3a.org.uk/members-area/support/workshops</i></p> |
| Running your u3a Date: | <p>Information to help you understand your role and responsibilities as a Committee Member including the guiding principles of u3a, what makes good governance and where additional support and guidance is available.</p> |
| Keeping it Legal Date: | <p>Information about the key areas all u3as need to be aware of and understand – insurance, data protection, equality and inclusion and safeguarding. It looks at practical steps to ensure compliance and where further information and support is available.</p> |
| Growth Matters Date: | <p>Ideas and information to help you grow your u3a the benefits of this including having a bigger pool of volunteers, more interest groups and ensuring your u3a continues to thrive. It also looks at some of the challenges and how these can be overcome.</p> |
| Recruiting and Valuing Volunteers Date: | <p>This workshop aims to support the recruitment and retention of volunteers to key roles, including committee members in your u3a, by attracting new members and keeping the u3a vibrant.</p> |
| Finance Matters Date: | <p>The objectives of the session are to: consider good financial practice within your u3a; discuss reporting requirements – what and to whom; give an overview of speaker fees and paid tutors, and to consider the necessary steps for claiming Gift Aid.</p> |
| Equality, Diversity & Inclusion Date: | <p>A coffee morning hosted by the Equality, Diversity, and Inclusion Committee. For u3a members to share experiences, raise awareness and help everyone increase their knowledge and understanding.</p> |



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| <p>Ilkeston u3a</p> <p>Ilkeston u3a Constitution</p> | |
| <p>Ilkeston u3a Policies and Procedures</p> | |
| <p><i>Free boxes for your own study and notes...</i></p> | |
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