This template has been provided the Scottish Council for Voluntary Organisations (SCVO).

Use of this model policy is entirely at your own risk. The policy should be adapted to suit your own organisational needs, and you should ensure if meets your own specific requirements. You should also check this policy is compliant with the law and your organisation’s governing document. No liability rests with SCVO.

For more information see our information on [using SCVO templates](https://scvo.scot/support/using-scvo-templates).

**Sample Trustee induction checklist**

New trustees 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 your organisation. It should ensure that each new trustee acquires the necessary detail of how the organisation and the governing body works, so that they can play a full part in discussions and decision-making.

An induction plan might include:

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

Here’s a sample induction checklist for what new trustees need to know. Ask existing trustees what they would have liked to know when they joined. Consider teaming up a new trustee with an existing one for a year. By meeting up briefly before meetings to go through the agenda and sitting together at meetings, the learning curve for new trustees can be shortened.

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| **Key documents** | **Date provided** | **Received** |
| Governing document |  |  |
| 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 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) |  |  |
| Risk register |  |  |
| Complaints Policy |  |  |
|  |  |  |
| **Organisational Information** |  |  |
| Mission statement |  |  |
| Brief history of the organisation |  |  |
| Organisation/staff structure |  |  |
| Contact details of board members and key personnel |  |  |
| Policies which apply to the board (e.g. equal opps/social media) |  |  |
| Job description of chief executive or key staff/volunteers |  |  |
| Business or strategic plan |  |  |
| Newsletters, publicity information |  |  |
| List of key stakeholders |  |  |

**Document version control**

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| --- | --- | --- | --- |
| **Version number** | **Change or update** | **Author or owner** | **Date** |
| 1.0 | First version |  | Oct 2022 |
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