

Trustee Induction & Development

1. Introduction

Each trustee brings a wealth of skills and experience, and each will have different needs to fully acquaint themselves with their role and responsibilities as a trustee and director of the Trust. The induction of a new trustee and subsequent opportunities for training and continuing professional development (CPD) are vital for improving the effectiveness of the trustee body of the Woodland Trust.

2. Information and Onboarding

New trustees will be provided with

2.1. Induction Pack including:

- Acceptance letter to the Company Secretary
- Registration details form for the Charity Commission and Companies House
- Declaration of Interests form
- Bank details form

2.2. Trustee Handbook including:

- Introduction to the Woodland Trust, our vision and values
- Overview of charity law, The Essential Trustee: guidance from the Charity Commission, code of conduct, development and reviews
- The Role and Operation of the Board and Committees and the Memorandum and Articles of Association
- Organigram of Colleagues and contacts
- Strategic documents and Annual Report
- Key Policies
- Appendices: Acronyms and useful resources

3. Initial Support

3.1. Direct any additional queries to the Chair of Board Affairs Committee

3.2. Board Buddy: An existing trustee will be assigned as a 'Board Buddy' to support a new trustee during their first six months, providing informal assistance and background information on issues as they arise.

3.3. Induction Programme with Executive Staff: An induction programme at Grantham involving a range of staff and key members of the executive team to help the trustee understand the Trust's operations.

3.4. Site Visits: Arrangements for new trustees to visit Woodland Trust properties with regional staff, this will be combined with a Board meeting if desired.

4. Training and Development

4.1. Mandatory Events:

- Site Visits: Annual visits to key Woodland Trust sites.
Board Dinners: Quarterly opportunities for discussing new opportunities and meeting key external stakeholders.
- Strategy Day: Annual review/reset of the strategic direction.
- Pre-Board Dinner Training: Annual training on trustee responsibilities provided by an audit/legal firm, accredited for CPD units.

4.2. Voluntary Events:

- In-House: Annual legacy and stewardship events, pre-Board dinner training by investment managers.
- External: Signposting to training and webinars, including courses by NCVO, Charity Commission, ICAEW, Civil Society, Charity Finance Group, NSPCC, and others.

4.3. Development opportunities and training will be logged and shared quarterly at the Board Affairs Committee.

5. Feedback and Monitoring Effectiveness

5.1. Trustees should provide any useful feedback on induction, training and development to Chair of BAC.

5.2. The Board Secretariat will keep a record of all induction, attendance training & development for each trustee.

5.3. Each trustee will have an informal 1:1 meeting with the Chair of the Board annually to exchange ideas about WT and individual performance.