



VOLUNTARY

ACTION

North

Lanarkshire

Inclusive Trustee Recruitment

Voluntary Action North Lanarkshire

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1. What Do We Mean by Diversity

Trustee Diversity Covers the Following Aspects:

Protected Characteristics

The Equality Act became law in 2010. It covers everyone in Britain and protects people from discrimination, harassment and victimisation.

It is against the law to discriminate against someone because of:

- age
- race
- sex
- gender reassignment
- disability
- marriage or civil partnership
- religion or belief
- sexual orientation
- pregnancy or maternity

Lived Experience

When we speak of lived experience, we are specifically addressing lived experience of either structural disadvantage or a particular cause. For example, lived experience of poverty or housing insecurity would be of relevance to the board of a housing charity.

Class

Socio-economic class is our economic identity. This can overlap or intersect with some of the other areas of diversity on this list, such as protected characteristics or geographic location.

Neurodiversity

Neurodiversity covers conditions such as autism, attention deficit hyperactivity disorder (ADHD) and dyslexia, among others. While these conditions might be considered under disability, they will also impact diversity in ways of thinking. This can alter how a person problem solves and considers different issues, and even the risks they spot.

Geography

Geographic diversity covers representation from different areas. Trustee diversity in a local charity could cover representation from different parts of the city, borough or neighbourhood. Areas with a greater density of lower income households might be less well represented on a board.

Skills, Knowledge, Networks and Experience

This covers a relevant mixture of soft skills, ways of working, knowledge, professional backgrounds, experience (including lived experience) and networks. We can't emphasise enough that every new trustee you appoint must have skills, knowledge, networks or experience (including lived experience) that are useful to your organisation. Diversity never replaces skills, knowledge, networks and experience – it augments it.

2. The Role of Diversity in Good Governance and Organisational Resilience

- Access to talent
- Being closer to the cause
- Credibility
- Discussion and challenge

There is evidence that diverse boards are more resilient and innovative. Multiple research studies have demonstrated that diverse boards:

- Pore over evidence presented to them more closely – because they don't assume that the group is going to reach easy consensus.
- Are more innovative – because they have more varied life and professional experiences, so will come up with a wider set of possible solutions.
- Lead organisations that are more economically successful – because they are closer to their users' needs, are less likely to miss key opportunities and issues, and have greater credibility with their communities.

3. Common Misconceptions About Board Diversity

- I don't know what a trustee is.
- People like me don't become trustees.
- I've got nothing to offer.
- I don't know how to apply.
- I don't have the time or money.
- I've looked at who is already a trustee, and I don't think I'd fit in.
- I don't see myself reflected in what they're asking for in the advert.
- I don't think they would listen to me anyway.

4. What Really Stops People Becoming Trustees

- I don't know what a trustee is.
- I've never seen any adverts for trustees.
- People like me don't become trustees.
- I've got nothing to offer.
- I don't know how to apply.
- I don't have the time or money.
- I've looked at who is already a trustee and I don't think I'd fit in.
- I don't see myself reflected in what they're asking for in the advert.
- I don't think they would listen to me anyway

5. What We Need to Have in Place Before We Recruit?

[Download the Recruitment Checklist](#)

Much of the work of diversification and inclusion entails questioning the things we do by default. In the process of recruiting and inducting young trustees, boards should review and clarify their purpose, culture, training and innovate the way they operate

Some of the things we think you ought to have considered before you start to recruit trustees:

- Make sure you have your 'why' – Recruit for the right reasons: because you genuinely want to listen to and act on diverse perspectives.

- Examine the 'voice/listening gap' and take practical steps to address it – If you have trustees who are 'different' from their colleagues, do they contribute as much as the other trustees? Are they being listened to?
- Train all your trustees effectively – This means going beyond standard governance, regulation and policy-based training. All your trustees need upskilling to operate inclusively as a board.
- Root out exclusionary board behaviours – These can be as innocuous as overfamiliarity, **using jargon without context or explanation**, failing to explain history) and continuing with business as usual, even as the board's make-up changes.
- Back up good intentions with policies – Namely, a code of conduct and an anti-discrimination policy. Policy is just the baseline to reinforce the culture you want to create (or to avoid).
- Chair on the right note – Much of the tone-setting (and re-setting) will fall on the chair of the board. They have the power and responsibility to call out when someone is being shut down, making interventions before exclusionary actions escalate, and reinforcing which behaviours are unacceptable and which are encouraged.
- Be honest – This is a journey. You may get it wrong, despite your best efforts. The more honest and open you are about the journey you are on to diversify your board, the more respect and understanding you will earn from the communities you serve

Expenses

A key part of diversifying your board will be to make it easy and discreet to claim out-of-pocket expenses. These can include travel and accommodation expenses, and childcare. **Some of your trustees might need you to pay these expenses directly (e.g. arranging and paying for travel on their behalf), rather than reimbursing them.**

Times and flexibility of meeting times + Career considerations

6. Legalities

Is it Legal to Advertise for Underrepresented Trustees?

In short, yes, you can advertise for under-represented groups and encourage their participation in your recruitment process.

Boards and charity managers will often share hesitancy and confusion about whether they'll get in trouble for trying to diversify their boards. Sometimes the fear behind this is the possibility of offending the target audience (the trustees who would diversify their board) and appearing tokenistic. At other times, they're worried about backlash from people who may feel excluded from the process. For those familiar with the term from staff recruitment, 'positive action' does not normally apply to trustee recruitment, because trustees aren't (usually) employees, members, service users or paid for their services. In any case, taking proportionate steps to include under-represented groups isn't a form of 'positive discrimination' – it's addressing exclusion and removing unnecessary barriers to diversifying your board

No one wants tokenistic recruitment, least of all the individual you have appointed. This doesn't change the fact that board diversification will require targeted efforts to reach under-represented groups to encourage their participation in the recruitment process. These are meaningful steps to redress an imbalance that would otherwise have been repeated in your recruitment processes

Paying Trustees

You will need to check your governing document and your regulator's guidance to ascertain whether you are allowed to pay trustees and how.

Paying expenses is a different issue. A key part of diversifying your board will be to make it easy and discreet to claim out-of-pocket expenses. These can include travel and accommodation expenses, and childcare.

Some of your trustees might need you to pay these expenses directly (e.g. arranging and paying for travel on their behalf), rather than reimbursing them

"If you want to diversify beyond middle-class groups, you are going to understand that people are taking a financial hit. If you feel uncomfortable talking about that, it can become a real issue."

7. Practical Tips on Recruiting and Diversifying Your Board

Work Out What You Need

We recommend starting with a board audit. This is like a skills audit, only more holistic. It involves identifying areas where your board could be more representative and diverse, and will help you make an evidence-based decision

Because so much diversity is invisible, it's important that you provide an opportunity for board members to share the characteristics and areas of lived experience they possess. However, you must make it clear that this isn't mandatory.

Consider the 9 protected characteristics in the Equality act



Then, reflect on your organisational strategy.

What is your charity seeking to achieve and what does your board need in terms of skills, knowledge and experience to achieve that? It helps to ask these three questions to guide what you need next:

- What challenges and opportunities is your charity likely to face over the next 5 years?
- Do your trustees have the main skills, knowledge and experience (including lived experience) to tackle these challenges? (Take into account trustees leaving in the foreseeable future.)
- If not, what's missing? This will form the basis of your trustee recruitment

8. Running an Open Recruitment Process

- Declare we are looking for trustees at network events. Ask Ryan / board member to do a presentation about board membership and what it entails and **why we are looking for diversity**
- Follow up with open evenings
- Open evenings virtual or alongside network events
- advice, feedback and suggestions on how to **change the language in our adverts** and how to distribute to specialist **LinkedIn groups**.

The board was very wary of tokenistic appointments, so we examined the intersectionality between skill and experience. [The new process] helped us target our efforts accordingly'

Remove any Unnecessary Barriers

Do trustees need board experience?

While expecting or even simply desiring board experience might appear reasonable, in reality it directly excludes various groups that are under-represented in trusteeship.

Do trustees need a detailed understanding of charity governance or an 'understanding of their legal responsibilities'? Or can training be provided?

These requirements implicitly advantage existing trustees and people with access to trusteeship within their networks. Why recruit for what can be taught?

Is your language off-putting?

Phrases such as 'at a senior level' or 'significant senior experience' can exclude even those who do have substantial experience or expertise in a specific area, largely because 'seniority' is subjective and has a confidence correlation. The word 'senior' can also be seen to imply older candidates.

Are you using gendered language?

Are your meeting times excluding people?

Are you offering / paying trustee expenses as standard?

If you aren't advertising that you pay expenses, it will discourage applicants who may have been willing to take on an unpaid trusteeship but can't afford to be out of pocket. This will impact working-class or low-income candidates more than other groups.

Can people get to your meetings?

Does the time commitment have to be the same for everyone?

Could you re-think board positions?

Could two people take on the chair role as co-chairs? Could vice-chairs help share the load? This also helps with succession planning. If your governing document is restrictive, think about updating it.

Don't assume that candidates know about trusteeship

Remember that many people, including those with the skills you seek, may not have heard of trusteeship. Even if they have, it may be so far outside their circle that they are unfamiliar with the responsibilities involved or think it isn't open to *'people like them'*.

Don't implicitly or explicitly assume that your potential trustees know:

- That they want to be a trustee.
- That trusteeship is open to them.
- What a trustee is.
- Anything about your charity.
- How to apply to become a trustee.
- What a typical trustee recruitment process is.
- How to behave as an effective trustee – current trustees may not know this either

"It's always white men, so I never see myself in this description. Reading through the description of who you were looking for made me think it could be me."

Getting the Best Out of Your Applicants

When you put applicants at ease and offer support, everyone benefits. Your board will have an easier time assessing applications against your selection criteria when candidates have the opportunity to shine.

Think about:

The application medium – Some applicants will be more comfortable recording a two-minute video rather than writing a cover letter. Give them options.

Providing a chance to ask questions – Make it short, accessible and expectation free. A short online session can be ideal.

Being clear – Specify which questions or topics you'd like applicants to write about in their cover letter or talk about in their video. Or use a short application form that guides them to tell you what you want to know.

Giving sufficient notice

Providing reassurance – Actively put applicants at their ease in interviews and emphasise that it's a two-way conversation.

Creating an environment in which young trustees can flourish

'Following my year as an ambassador of the Young Trustees Movement, I've had a lot of time to reflect on the ways in which trustee boards can build inclusive environments for their members. One important area is the language that is used to talk about board members. I thought about a board that I had been on where I had been described several times as "the young trustee". We called the co-ordinating fulcrum of the board the "Chair". We called the finance expert the "Treasurer", so I thought nothing of the fact that I had a defining adjectival phrase. I was, after all, six years junior to the next oldest member of the board. I had been brought onto the board in order for the youth charity involved to make decisions more closely aligned with those it sought to help.

It was only when chairing an event at a major political location that I realised something wasn't right about that label. I introduced myself almost automatically as "the young trustee" on the board and was reminded by my fellow discussant that "you're on the board now, you're a trustee. That made me think quite deeply. It would never be appropriate to reduce me to another protected characteristic when introducing me as a board member. I am never "the black trustee" or "the trustee with a disability," so why should my age define my engagement with the board?'

The wording of trustee adverts is important

I'd been volunteering for the charity [where I'm a trustee] for a number of years. My notion of what a board was had been formed from when I saw the members of the board walking around the office. They were older than me, a bit scary and had loads of power. The advert I saw was in the members' magazine. It said, 'We particularly encourage applications from people who are in the age group 18-30.' I thought, 'That's me!'

Succession planning and alternatives / pipeline to trusteeship

'Shadow boards'

By 'pipeline scheme', we mean a programme to give aspiring trustees some exposure to trusteeship without actually becoming a trustee. This can be extremely valuable to potential trustees.

Pipeline schemes can take the form of offers to:

- Join or co-found a shadow board, advisory board or steering group.
- Provide informal feedback to the board.
- Shadow a particular board member.
- Shadow the whole board as a board apprentice or observer trustee.

However, you should avoid suddenly creating a new pipeline scheme as an ad hoc response to receiving promising applications from applicants who the board can't accommodate either because of numbers or because they aren't eligible for full board membership.

The aims of the pipeline scheme are critical. Ask yourselves the following questions:

- Will the scheme have a clear, guaranteed pipeline to the board (i.e. first refusal when the next trustee's term ends) or will it put the applicants in the pool to be considered in the next recruitment round?
- Will it give applicants training, experience and opportunities to become trustees elsewhere? Does your charity have capacity to facilitate this?
- How will you distinguish shadow trustees' responsibilities from those of full trustees and how will you communicate this?
- Is the pipeline scheme necessary or do you just need better support structures built into the board itself?

If you're unclear about your pipeline scheme's aims, it will be unclear to applicants and could lead to confusion. This is a breeding ground for mismatched expectations.

Reasons not to create a board pipeline scheme:

- To provide a consolation prize for unsuccessful applicants.
- To restrict first-time trustees to non-trustee opportunities.
- Because you are procrastinating or trying to prevent your board from diversifying. If you are thinking about creating a pipeline scheme, we recommend:

Creating the opportunity in advance of your trustee recruitment and advertising it as a separate avenue. This means people can decide which one they want to go for – it gives

applicants agency, doesn't patronise them and allows those who might feel uncertain about trusteeship to get a taste of it.

Diversifying your board alongside promoting the pipeline scheme – one doesn't have to prevent the other.

Resourcing the pipeline scheme (including training, induction, support, expenses, structured offerings and time frames).

Thinking about existing structures you might use to support succession planning (e.g. inviting people to join subcommittees).

Sub committees or working groups

Sub committees or working groups can attract people who may not feel ready for trusteeship or cannot commit to regular meetings, but who wish to get involved or influence certain aspects of the work of the charity.

Working groups might focus on specific practical operational matters, such as overseeing the running of a community centre. They can also have a focus on specific issues such as diversity and inclusion or youth involvement.

Recruitment practises

What not to include in your advert

Here are a few excerpts of real adverts demonstrating some of the typical pitfalls.

"This is an exciting opportunity for three senior professionals... to join xxx as a Trustee. We are seeking applications to fill vacancies on xxx's Trustee Board with high calibre of people..."

Limiting factors: How many current trustees can describe the Companies Act 2006 to you? Referencing legislation, particularly without context or examples, may intimidate potential applicants.

Be a company director of xxx fulfilling all the statutory requirements of that role and complying with the requirements under the Companies Act 2006.

Actively fulfil the duties of a charity trustee and be familiar with these responsibilities."

Limiting factors: Those defined under senior professionals are unlikely to be young people. Words like 'senior' might put off people you would consider to be senior but who do not

identify with the term themselves. Similarly, elitist terminology is likely to put off candidates – even if they meet the description.

9. What to Include in Your Trustee Advert

Charity Overview: Explain what your charity does and why becoming a trustee is an exciting opportunity.

Skills and Experience: Specify the skills and experience you are looking for and why they are important.

Encouraged Applications: Highlight any groups you particularly encourage to apply.

Trustee Role: Describe what a trustee does.

Time Commitment: Outline the expected time commitment.

Benefits: Mention any benefits, such as out-of-pocket expenses and training, and explicitly outline benefits relevant to under-represented groups (e.g., childcare expenses).

Meeting Details: State where the meetings are held.

Additional Information: Provide details on how to find out more information and how to apply.

Important Dates: Include closing and interview dates.

10. Checklist for Your Advert

Excitement and Motivation: Ensure the advert is exciting and motivating about your charity's work and the difference a trustee can make. Think about what images you use as well as the copy

Clarity: Be clear about the skills, knowledge, and experience applicants need and why.

Inclusivity: Make sure the advert is inclusive and likely to attract a broad range of people with the necessary skills, knowledge, and experience.

Support: Explicitly mention the support you offer to trustees, such as expenses and training.

11. Encouraging Applications for Trustee Positions

Charities often seek ways to attract applications from under-represented groups or individuals without prior experience, without appearing tokenistic. Here are some effective examples:

1. General Encouragement:

"Previous board/trustee experience is not necessary and we welcome applications from all ages and backgrounds."

2. First-Time Trustees:

"It is not necessary to have previous board committee experience as training will be provided. This position would therefore suit an individual taking their first steps to develop wider board level and governance experience." (Example from Sense about Science)

3. Targeted Encouragement:

"We particularly welcome applications from [women, people of colour, under 30s, people with lived experience of homelessness...] as we want our board to be more representative."

4. Specific Example:

"At Flamingo Chicks we embrace diversity. We recognise that the genre of ballet is predominantly white and are committed to making change. Our work on this is at all levels, and we feel passionate that our trustee board should be truly representative of the people it serves. We're therefore encouraging applicants from all backgrounds and (especially those) from Black, Asian and minority ethnic groups. Given the nature of our work, we are keen to add more voices with lived disability experience to the board too – helping us evolve our work with all disabilities in mind."

12. Trustee Listing Websites

- [Reach Volunteering](#)
- [CharityJob](#)
- [Goodmoves](#)
- [SCVO \(Scotland\)](#)
- [Digital Trustee Profiles - Third Sector Lab](#)
- Local resources

- Volunteer centres/councils for voluntary service
- Posters in local spaces such as hospitals, civic centres and universities
- Local Facebook groups, newsletters and e-magazines
- Local press
- Skills- or knowledge-based search
- Workplaces/employers/business parks
- Formal and informal networks
- Membership bodies for certain professions
- Publications, websites, online networks for different professions
- Professional associations and bodies
- The Honorary Treasurers Forum
- Digital Trustees

13. Targeting Underrepresented Groups

If seeking to diversify your board, targeted platforms will be one of your best allies in the advertising process. This is how you do the legwork to actively reach and encourage groups that are under-represented on your board to apply.

Specific listing websites/platforms that cater for protected characteristics in trusteeship include:

- [Young Trustees Movement](#)
- [Women on Boards](#)
- [Action for Trustee Racial Diversity](#)

Professional/work-focused membership bodies built around protected characteristics include:

- [Black Fundraisers UK](#)
- [Women in Banking & Finance](#)
- [BYP Network](#)
- [Black Solicitors Network](#)
- [International Association of Young Lawyers \(AIJA\)](#)

14. Acknowledgement

This guide is a condensed version of insights originally published by *Getting on Board* in their resource *How to Diversify Your Charity's Board*. Although the organisation has now closed, their guidance remains an incredibly valuable reference for trustee recruitment and board diversity.

[Getting on Board - How to Diversify Your Charity's Board](#)

If you are interested in featuring links to local resources in this report, please reach out to us at: **info@vanl.co.uk**