

Appendix 7: Trustee Shortlisting Proforma

Step 1: Is it Legal? (non-negotiable)

If there are any legal impediments (e.g. conflicts of interest, undischarged bankrupt) to the applicant becoming a Trustee? If so then the person should be rejected.

Step 2: Professional Knowledge (non-negotiable)

	Yes	No	Evidence	Concerns
1. Does the candidate have enough professional knowledge?				

Step 3: Other Essential Criteria

The best applicants will tick the 'yes' box in the following areas

	Yes	No	Evidence
2. Have good reasons for wanting to be a Trustee			
3. Knowledge of the legal duties of Trusteeship			
4. Willing to put in enough time and effort to the role			
5. Have a range of leadership skills			
6. Show prior commitment to the organisation			

Step 4: Decision

Shortlist / Reject

Key Strengths

Areas to explore at interview