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Ready to get on board?

An introduction to trusteeship

On 7 November 2011, NPC and The Clothworkers' Company held a seminar for people who are interested in exploring the idea of charity trusteeship. Some of the 80 attendees were new trustees, and others were thinking about becoming a trustee but were not sure what it might involve or how to get started.

This report highlights the key themes discussed during the seminar, looking at the responsibilities of a charity's board, what trusteeship actually involves, what makes a good trustee, and how to begin.

The seminar was chaired by **Rob Abercrombie**, Co-Director of Research and Consulting at NPC. The panellists were:

- **Sarah King**, Chief Executive of Reach, the skilled volunteering charity.
- **Mark Webster** (Trustee) and **Gracia McGrath** (Chief Executive) of Chance UK, the mentoring charity.
- **Kate Bolsover** (Deputy Chair) and **Abi Levitt** (Marketing & Communications Director) from the employment charity Tomorrow's People.

Introduction

At the start of Trustees Week 2011, the charity Getting on Board published the results of a survey, which found that although 21% of British adults say that they would like to sit on the board of a charity, only 12% say that they are interested in becoming a charity trustee—two roles that are fundamentally the same. What is more, half of adults have no idea what a charity trustee is.

It is crucial that this confusion is addressed, not least because so many charities need trustees. Almost half of UK charities—around 80,000 organisations—have at least one vacancy on their board.

So what is a trustee? According to the Charity Commission, *'Charity trustees are the people who serve on the governing body of a charity. They ... are*

responsible for the general control and management of the administration of a charity ... The great majority of trustees serve as volunteers, and receive no payment for their work.'

Responsibilities

As Sarah King explained, trustees have various mandatory and optional responsibilities. Three of the key responsibilities are:

1. **Monitoring progress and achievements:** Trustees need to keep their eye on the mission and vision of their charity, and make sure that they are aligned with its activities and goals. New trustees can be particularly helpful at reminding a board to bear the charity's vision in mind.
2. **Keeping the charity legal:** Trustees have overall legal responsibility for their charity, so they should be aware of and follow what their governing documents say. The exact legal position and responsibilities of trustees vary depending on whether the charity is incorporated or not. There tends to be less risk if the charity is a company limited by guarantee.
3. **Overseeing the finances:** All trustees should keep a careful check on their charity's finances and activities, and not just rely on the treasurer or finance manager, even if they do not feel particularly comfortable dealing with accounts. Money must be used



appropriately, prudently and lawfully to make sure that the charity stays safe as an organisation.

Roles: What does trusteeship actually involve?

The financial and legal responsibilities that trustees hold can at times seem abstract and removed from the day-to-day activities of a charity. Some charities have job descriptions and person specifications for each trustee. Other charities take a less formal approach, and roles can vary widely depending on the size and nature of the organisation.

Knowing what the role involves in practice helps trustees to know whether they are doing a good job. As Gracia McGrath said, *'If trustees don't have a defined role, it is very difficult to work out how effective they are.'*

With or without a job description, trusteeship should always involve a time commitment, a relationship with the charity's staff, and a connection to the charity's activities.

To find out more about what trusteeship involves, read the NCVO's *12 Essential Roles of a Board*: www.reachskills.org.uk/essential-roles-volunteers.

Time commitment

Boards typically meet every two or three months for around three hours a time. However, many charity's boards meet more frequently—it can be once a month for small charities that need more monitoring and guidance. Many boards have optional sub-committees too, on subjects such as finances, remuneration and risk.

Potential trustees should make sure they ask about the time they will need to give. This depends partly on how much the trustee is prepared to give, being realistic and setting appropriate boundaries. But it also depends on the charity's requirements, bearing in mind that board members need to prepare for meetings and stay in touch with the charity's activities in order to make good decisions. In difficult times, trustees should be prepared to be drawn in and commit more time.

Many charities do not specify a minimum or maximum length of commitment for their trustees. Some people become a trustee and resign within a couple of months, finding the role unsuitable for some reason. Others may remain on a board for ten or more years.

Ideally, trustees should do enough research to find out if the role is right for them, which should avoid the problem of wanting to resign as soon as they have begun. But they should also be aware of when the best time might be to move on, as charities benefit from having some turnover

on their boards to remain challenging, mobile and energetic. Trustees should try to commit for at least a year, and perhaps think about moving on after three or four years, if appropriate.

Activities

Many trustees try to get involved in their charities beyond governance, helping to deliver services. This is particularly true for small charities that have few staff and need their trustees to roll their sleeves up and help in a practical way. It might mean answering calls to a helpline, helping with office administration or running a drop-in group. This kind of involvement is laudable and brings significant benefits to both the trustee and the charity—the trustee really gets to know the charity's activities, and the charity benefits from having an extra pair of hands.

Nevertheless, trustees should exercise some caution here. They are primarily responsible for governance, and staff and volunteers should be primarily responsible for providing activities and running the office. Wherever possible, trustees who want to volunteer beyond their governance role should recognise the distinction between the roles and not blur the boundaries.

Relationship with staff

It is crucial that trustees build good relationships with staff. It is staff who are delivering most of the charity's work, so strong relationships can inform the board of the charity's activities and progress, and inform staff of direction and strategy. A strong team, with plenty of interaction between trustees, staff and volunteers, is key to building a more effective charity.

In charities with a small staff team, trustees can benefit from getting to know the whole team, as well as some volunteers. In large charities, it is the relationship with the senior management team that is most important to nurture, although getting to know staff throughout the charity can help to give a more rounded picture.

Trustees are responsible for appointing senior members of staff—most importantly, the chief executive—and they can then delegate some authority to those senior staff.

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The relationship between the chief executive and the chair of trustees is a particularly important one. It needs to be an effective relationship with a balance. Ultimately, it is the board that manages the chief executive, but the chief executive also needs to manage the board in some ways, being responsible for the day-to-day running of the organisation.

Some charities encourage mentoring relationships between senior managers and trustees. Chance UK and Tomorrow's People have both found this kind of mentoring to be really positive and fruitful, particularly when it is focused on particular issues, such as communications. It enables a sense of shared responsibility.

In a mentoring relationship, it is important to establish terms of engagement and for both sides to know their boundaries, particularly when it comes to the time commitment of the mentor, who may be working full time elsewhere. As Kate Bolsover from Tomorrow's People said, *'Trust and respect are absolutely key.'*

What makes a good trustee?

Our panellists highlighted five key qualities that good trustees can bring to the role. Three of these—objectivity, constructive criticism and commitment—are important for all trustees. The other two—skills and connections—are equally important, but people thinking about becoming a trustee should not be put off if they do not think they have valuable skills or connections. Sometimes, good listening skills can be just as valuable as accounting skills, and a young person's friends from university might prove to be just as useful as a business person's professional network.

Skills

Gracia McGrath from Chance UK emphasised that lots of new trustees are looking for a change of scenery and a new challenge, involving something different from their day job. This is fine, as long as they do not leave their skills at the door. Accountants, for example, should have a professional attitude to their work with the charity and contribute their financial expertise to the board.

Specialist skills, such as accounting, business planning and legal skills, certainly add value to a board. But charities benefit from drawing on softer skills, such as teamworking, problem solving and people management.

'Being a trustee is a joy and a privilege and a challenge.'

Objectivity

Trustees should always act in the interest of the charity without bringing their personal interests to the table. They need to be objective and stand back.

This is particularly true when service users are on the board. Service users can provide an important perspective, helping other trustees to understand the needs of their beneficiaries, for example. But this should not lead to a bias towards developing services that might help one particular trustee's situation or family, if it is not the most effective way to help the charity's target audience in line with its mission.

Constructive criticism

Charities benefit from having trustees who are willing to ask questions, challenge the board and senior management team, and provide constructive criticism.

Gracia McGrath from Chance UK told us, *'Conflict may arise, but that's not necessarily a bad thing. Good trustees are critical friends to the organisation.'*

Trustees should discuss any causes of contention and where possible, get these out of the way before meeting the chief executive or other staff. Disagreements can sometimes be fractious, but they can enable resolution, and trustees should remember that they share the same goals, values and mission, even if there are different opinions about how to get there. It can make for interesting, lively debate.

'Good trustees are critical friends to the organisation.'

Connections

Kate Bolsover from Tomorrow's People highlighted the importance of the ambassador role that trustees can play if they are prepared to draw on their own network and make new contacts. Trustees can introduce their charity to interesting people, leading to new funding, campaigning or partnerships, for instance.

Commitment

Underlining all of the other qualities of a good trustee is the commitment that each trustee should have to his or her charity. Trustees and charities benefit when board members stay connected to the charity and its work, perhaps by volunteering to help out in the office occasionally (depending on the size of the organisation). They should be present and supportive when needed, be

responsive to the charity's needs, and be passionate about its work.

Becoming a trustee

An estimated 40,000 charities in the UK have at least one vacancy on their board, so it should not be very hard for potential trustees to find an interesting role. Yet people do struggle to find trusteeship positions, and charities struggle to fill their vacancies. Many people do not know where to look, and charities do not always advertise in the right places. So if you are interested in becoming a trustee, where could you start?

Finding a vacancy

There are lots of routes into trusteeship. Various organisations in the UK help people to find trusteeship roles. They include:

- TrusteeWorks (www.reachskills.org.uk/trusteeworks), which is run by Reach, the skilled volunteering charity; and
- Getting on Board (www.gettingonboard.org), which specialises in board level volunteering.

Trustee vacancies can also be found on various websites, including:

- Trustee Bank (www.ncvo-vol.org.uk/trusteebank)
- Do-it (www.do-it.org.uk)
- CharityJOB (www.charityjob.co.uk)
- The Guardian (www.jobs.guardian.co.uk/charity)

Local libraries, community notice boards and newspapers advertise trustee vacancies. It can also be worth approaching a charity directly, particularly if it is a smaller, local charity. Finally, pro bono work can be a good route into trusteeship.

Choosing a charity

As Sarah King from Reach pointed out, there are all sorts of appropriate reasons and motivations for becoming a trustee of a particular charity. For example, there may be a local connection, or it may be that a particular cause, such as cancer, has touched your life.

Whatever the reasons, it is important for trustees to select their charity carefully, asking questions up front and being aware of what they are getting in to. Good questions to ask include:

- Do you support the charity's aims and objectives?

- Are you clear about what the charity does?
- Have you met other trustees, staff and volunteers? Are you able to work well with them?
- Do you feel inspired by the charity?
- Can you give the time the charity is looking for?
- Are your skills and experience appropriate, and will they be valued?
- Does the charity provide an induction and training?
- What is your gut feeling? Is this the charity for you?

As with a paid job, it is fine to apply for more than one trusteeship role at a time, but it is particularly important that you are open and honest with the charities to avoid wasting their time. By applying to charities that you are really interested in, you stand the best chance of finding a role that is rewarding and beneficial for both you and the charity.

Final thoughts: the benefits of trusteeship

All the panelists concluded by emphasising not only the benefits that good trustees can bring to charities, but also the benefits that trusteeship can bring to trustees.

Trusteeship is rewarding, educational, enjoyable and good for your career—for instance, as a stepping stone to the board of a private company. In the words of our panelists:

'Part of the pleasure of being a trustee is the intellectual stimulation it brings.'—Kate Bolsover, Tomorrow's People

'Becoming a trustee was one of the most inspiring decisions of my life. I've seen the outcome of the work I've contributed to as a board member—we've changed lives.'—Sarah King, Reach

'Being a trustee is a joy and a privilege and a challenge. You get an awful lot out of it.'—Mark Webster, Chance UK

Further reading

To find out more about the issues raised in this briefing, read NPC's report, *The benefits of trusteeship*, published in March 2012.

www.philanthropycapital.org/publications/improving_the_sector/trusteeship

