

How can we help more people to become charity trustees: skills, experience and responsibilities

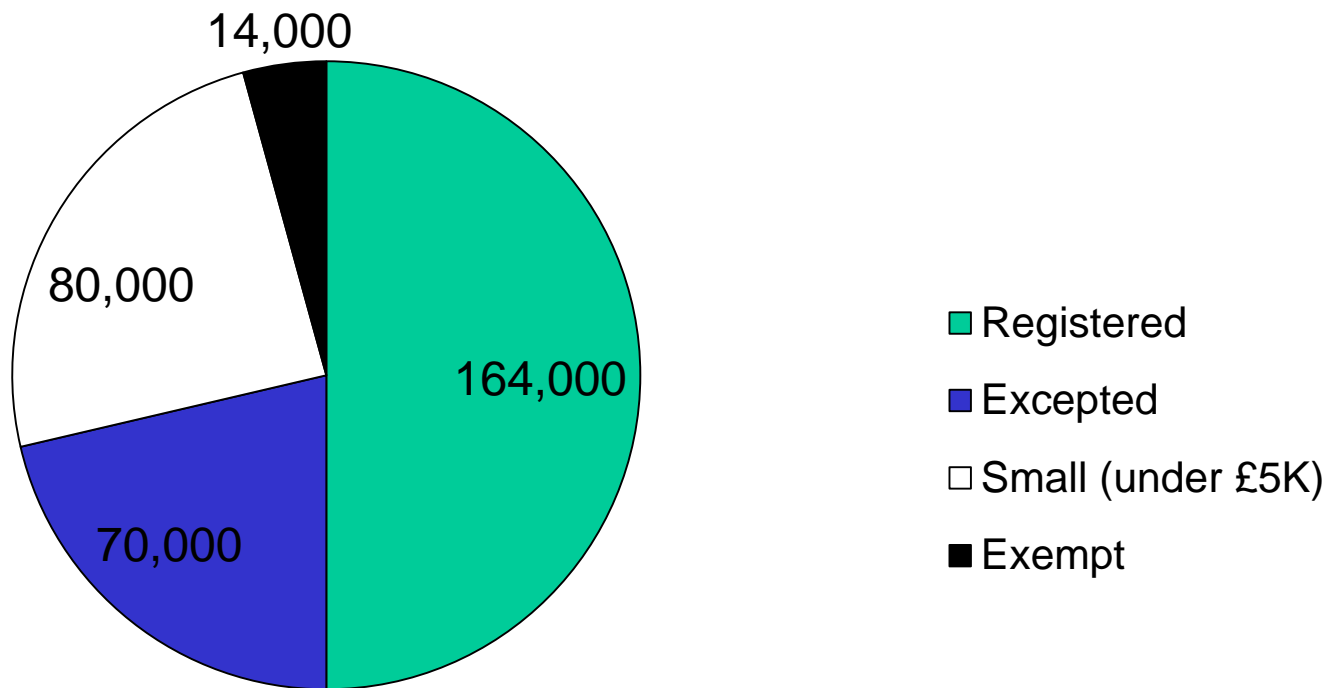
Neal Green

Senior Policy Advisor



The size and shape of the sector

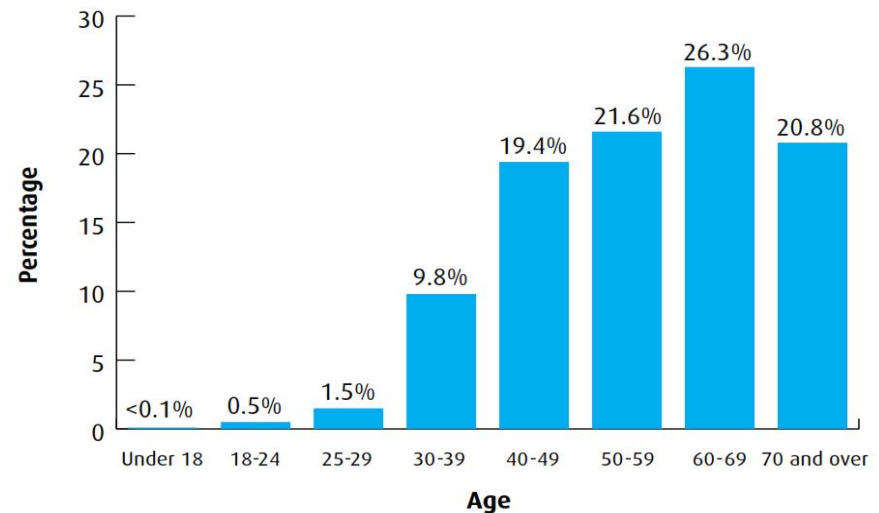
Number of charities in England & Wales



Do we need more trustees?

- $\frac{1}{3}$ to $\frac{1}{2}$ of registered charities have at least one vacancy
- Many charities struggle to get new trustees
- 46% of trustees are 60+
- <1% are under 24
- People with disabilities and from BME backgrounds under-represented
- Women (43.4% of trustees) slightly under-represented

Trustees by age band



Does it matter? What are the risks?

CHARITY
COMMISSION

- 'group think'
- Becoming increasingly isolated/irrelevant
- Trusteeship becoming a life sentence
- Charities closing or getting into trouble

Do we want more trustees?

CHARITY
COMMISSION

- Only if they are up to the job:
 - The skills your charity needs (or capacity to learn)
 - Life experience that's relevant to your charity and its beneficiaries
 - Understanding of the responsibilities and the role
 - Willing to put in the time to govern effectively
- Don't forget passion for the mission!

Working out what you need

CHARITY
COMMISSION

1. Audit your board's skills

- What have you got?
- What do you need?
- What can you learn?
- What do you need to recruit?



2. Decide how many trustees you need

- Check your governing document – what's allowed?
- What's a workable number?

3. Aim for diversity, not tokenism!

- Experience and perspective
- Informing and enriching your decisions

Recruiting

CHARITY
COMMISSION



- Be creative
- Don't just ask your friends
- Advertise
 - local papers for local charities?
 - Free online e.g. Trustees' Week, NCVO Trustee Bank, Trusteefinder
- Recruitment consultants? (See Trustees' Week)
- Grow your own talent – your volunteers and supporters? (Esp for younger people)
- NB - need permission/power to have user/beneficiary trustees



Before you appoint, check:

- Age 18+ (16+ for companies and CIOs)
- Not disqualified on legal/financial grounds
- Not barred on safeguarding grounds
- Rules in the governing document
- Conflicts of interest?

The image shows a screenshot of the Charity Commission's Trustee Declaration form. The form is titled "Trustee declaration" and includes the following sections:

- Organisation name:** A text input field.
- Total number of trustees:** A text input field.
- Trustee eligibility and responsibility:** A section with a heading and a sub-heading "By signing this form, you declare that you:". It contains a list of bullet points detailing the requirements for trustees, including age, disqualification, and conflicts of interest.
- Trustees named:** A section with a heading and a sub-heading "Trustees named". It contains four columns for trustee information, each with fields for name, signature, and date.

The form is designed to be completed by trustees or directors of a charity, and it is used to declare that the trustees are eligible and responsible for acting as trustees of the charity.

Make sure trustees understand their duties:



- You **must**:
 - carry out your charity’s purposes for public benefit
 - comply with your governing document and the law
 - act only in the charity’s best interests
 - manage the charity’s resources responsibly
 - act with reasonable care and skill
- You **should** :
 - ensure your charity is accountable
 - plan for the future

How you can help new trustees:

CHARITY
COMMISSION

- Be realistic about the time commitment
- Don't start by parachuting people in as trustees (especially young people)
- Buddying?
- Provide copies of all the information they need (governing document, financial, what the charity does, key policies)
- Encourage trustees to claim reasonable expenses
- Provide suitable induction and training
- Fixed terms of appointment?

How you can help new trustees (2):

- Make board papers:
 - clear and to the point
 - concise but sufficiently detailed
 - available in plenty of time
- Make meetings accessible – time, place
- Make meetings welcoming
- Chair meetings effectively
 - allow everyone to contribute
 - keep to the point
 - keep to time
- Action the action points – or why bother?

How to avoid common mistakes

CHARITY
COMMISSION

- Understand your responsibilities
- Know your governing document
- Make decisions properly
- Deal with conflicts of interest
- Be prepared to challenge assumptions
- Don't be too trusting
- Ask questions (even 'awkward' or 'stupid' ones)
- Make sure you comply with filing requirements

- Nominated trustees not there as representatives!

Essential reading

- Trustee Board: people and skills
- The essential trustee (CC3)
 - Check out the new consultation draft!
- It's your decision
- Conflicts of interest: a guide for charity trustees (CC29)
- Managing charity assets and resources (CC25)
- Your governing document and accounts

Really worth reading:

- Good governance: a code for the voluntary and community sector (www.governancecode.org)
- A Chair's Compass (www.associationofchairs.org.uk)