

Trustee research – April 2022

For the Charity Commission for England and Wales

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Executive summary

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Since 2020, there has been little change in trustees' understanding of their role and their confidence in performing it

- + Trustees are highly confident that they know what their role entails and that they are able to fulfil it in the time available to them. They also feel confident that they are able to protect their charity from wrongdoing and harm.
- + As in previous years, most trustees recognise the making of important decisions as their responsibility, while their understanding of what qualifies as a conflict of interest is as it was last year - generally sound but with some room for greater clarity.
- + Trustees believe that when charities don't meet public expectations, this is more likely due to charities not being aware of public requirements rather than public lack of knowledge on charity complexity. However, some trustees seem less sure than before of what those expectations are.
- + Trustees see most areas of governance as their responsibility, but not so many think it is their role to deal with the Commission.
- + Trustees are generally confident in the Commission's ability to deal with wrongdoing once it has been highlighted and that it will be able to uncover wrongdoing, but they are markedly more confident in the former than the latter.

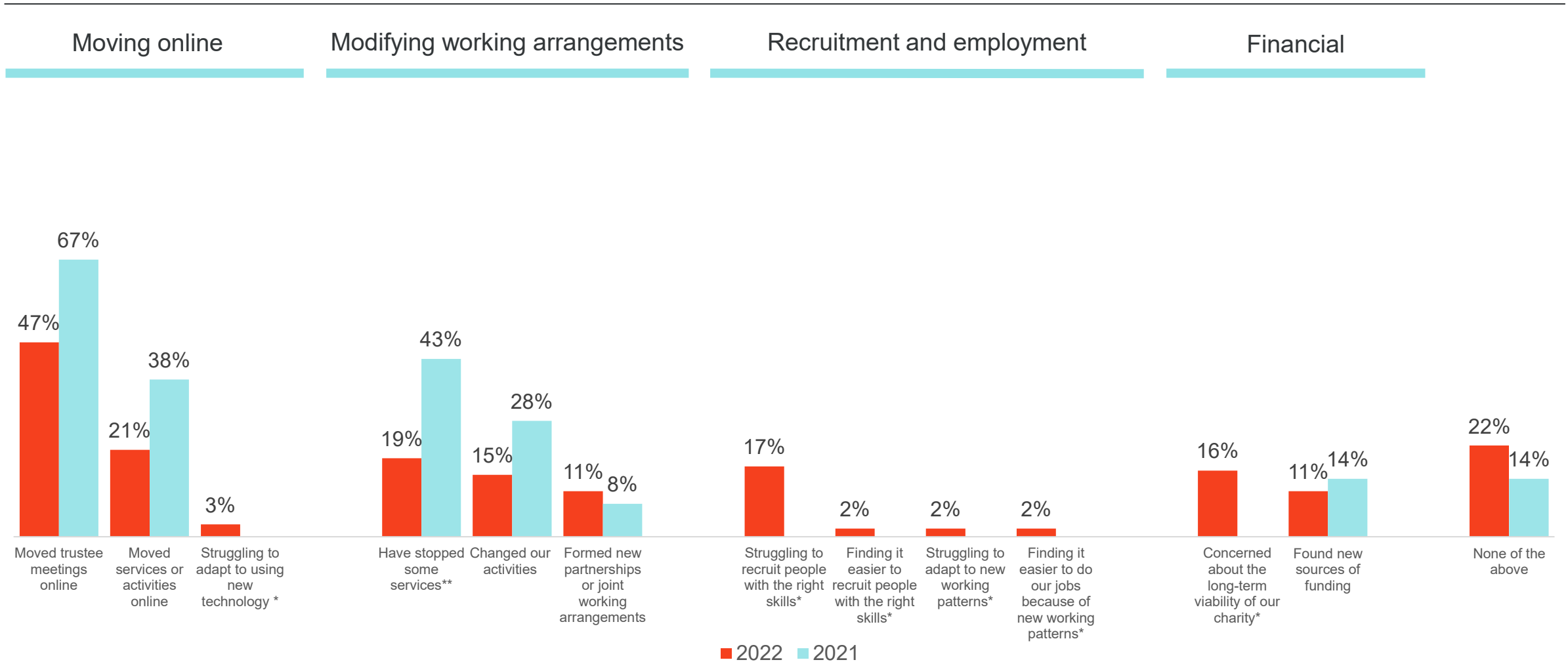
Where the pandemic has had an impact, it is principally evident in the greater use of online facilities

- + When it comes to looking for guidance in their role, the increasing reliance on the internet is a notable trend with 59% saying they search online one or more times a year in 2022 compared to 41% in 2020.
- + Although the impact of the pandemic in forcing activities, meetings and services online is less pronounced than in 2021 during the midst of the pandemic, the change is still clearly present, particularly in larger charities.
- + Whilst we have seen a reduction in the adaptations made due to the pandemic, it seems likely that many trustees will continue to make greater use of digital facilities in their role.
- + This underscores the importance of the Commission providing accessible help and increasing awareness of online guidance, as most trustees are not currently aware of the 5-minutes guides.

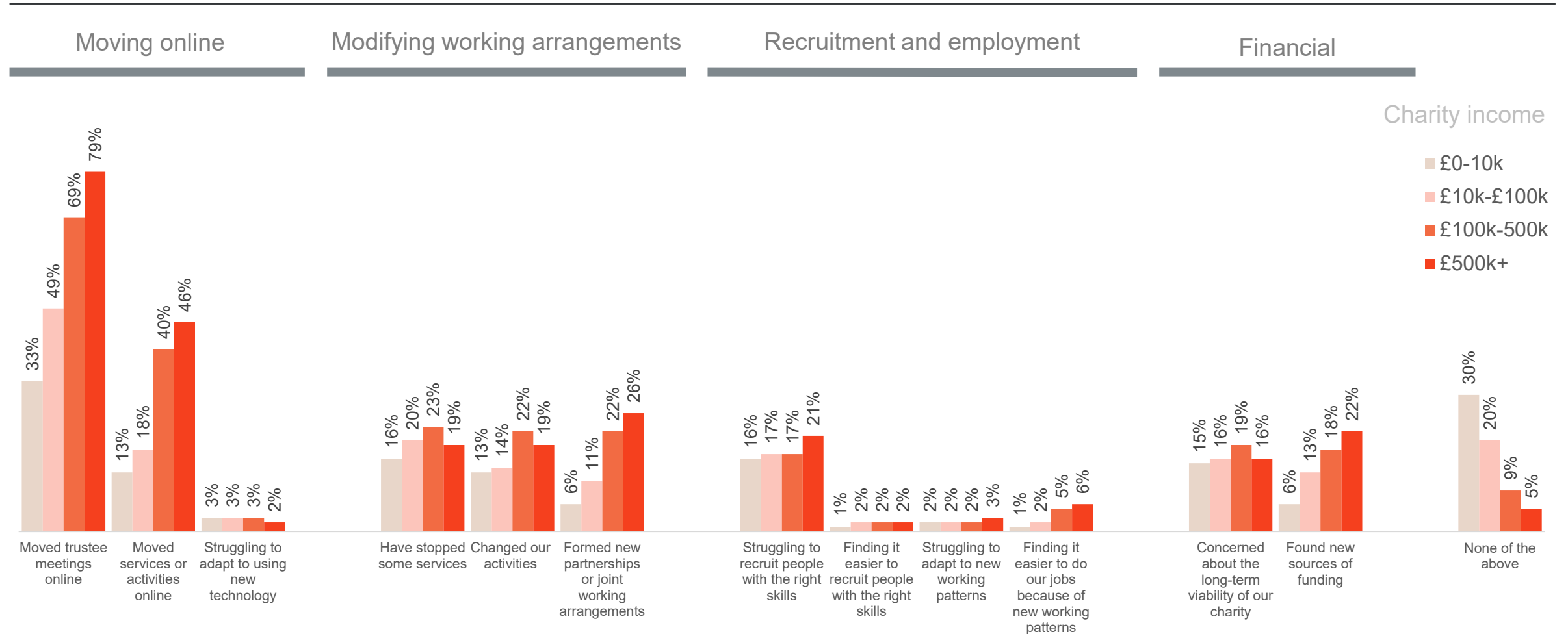
The Covid pandemic continues to drive the adoption of online practices, especially in larger charities.

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There has been a reduction in adaptations made to charities due to the COVID-19 pandemic. However, there still are some concerns about recruitment and charity viability



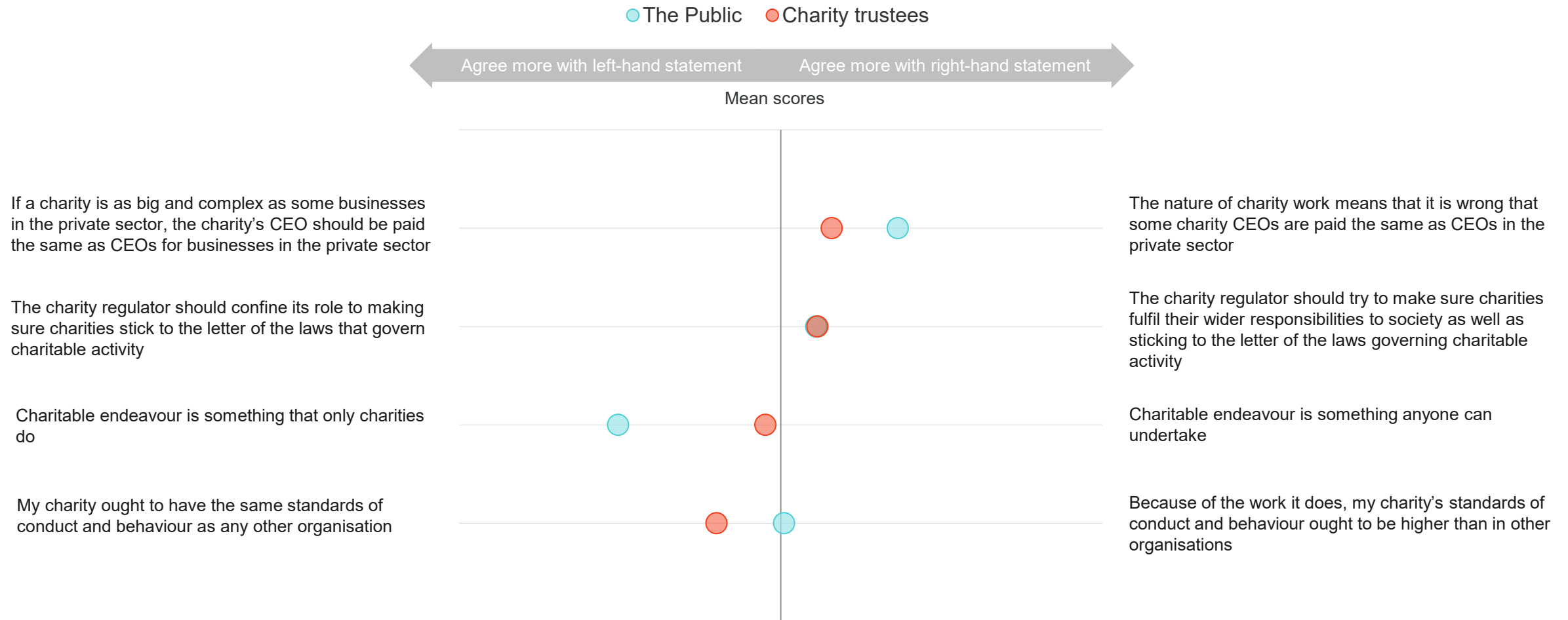
Larger charities are much more likely to have moved meetings and activities online



**Trustees remain broadly confident
that they understand public
expectations.**

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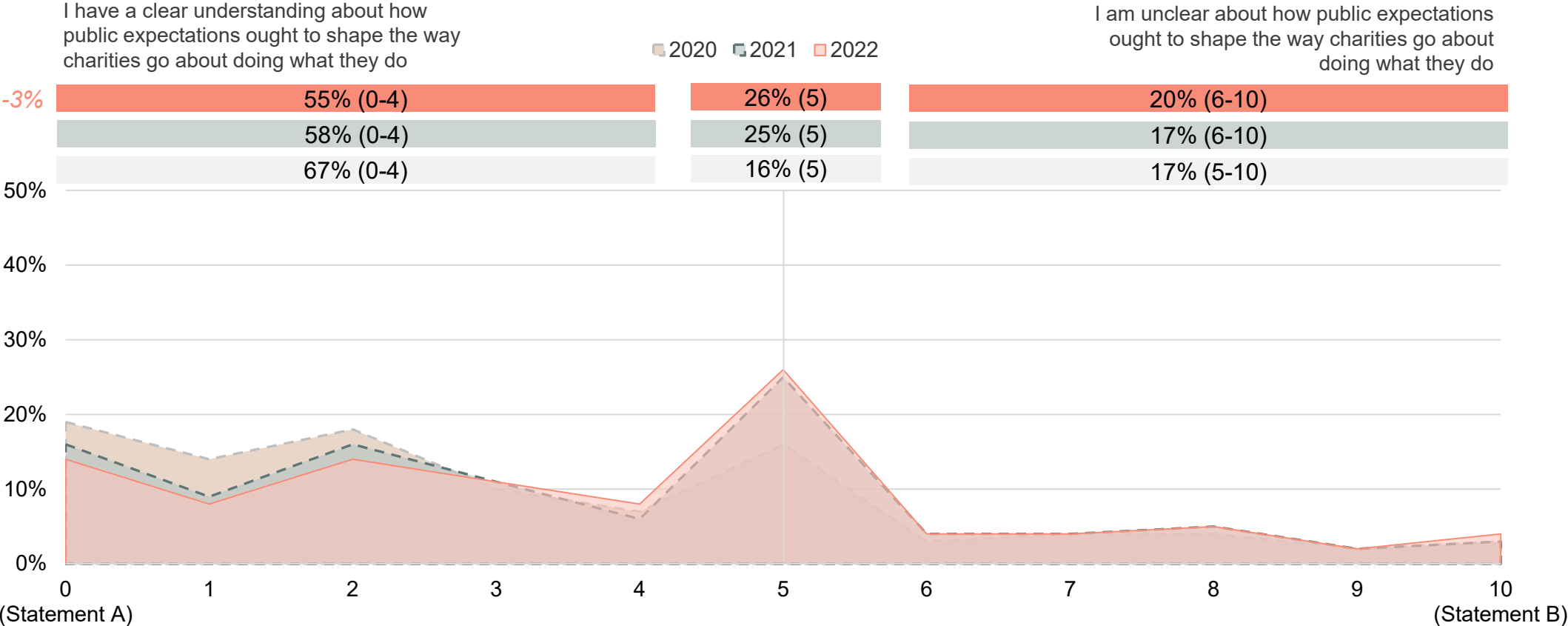
The public and trustees have similar views on many issues affecting charities



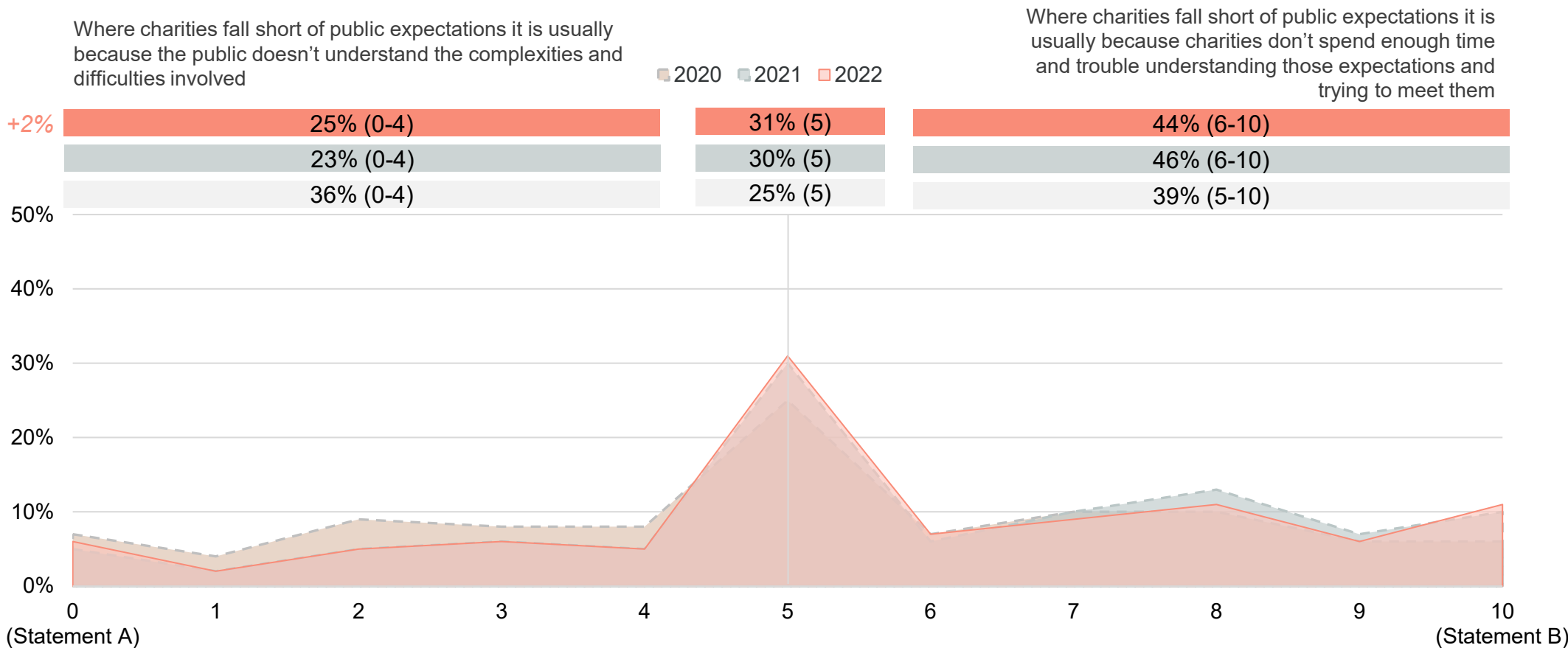
They are in agreement with charities pushing for change in society, but less so on charities' involvement in debate



The majority of trustees say they understand how public expectations should shape their charities' work, but some seem less sure than before

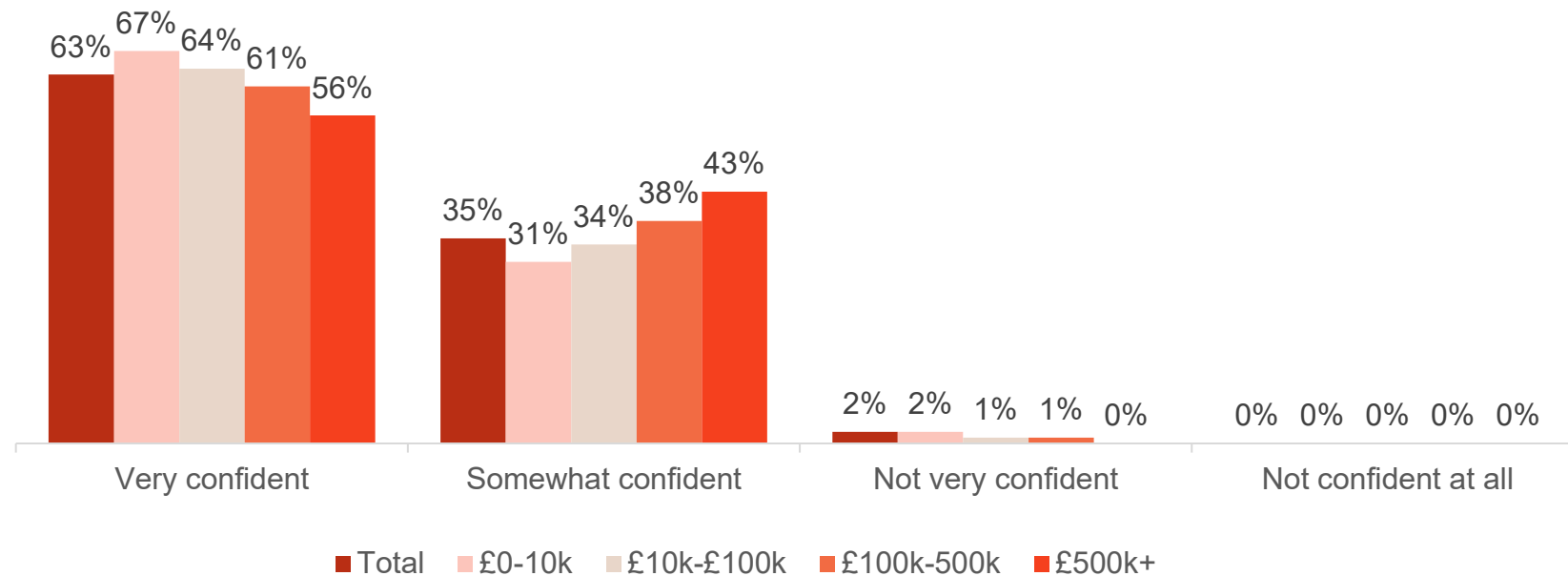


Trustees believe that when charities don't meet public expectations, this is more likely due to charities not taking care to meet those expectations rather than public lack of knowledge on charity complexity



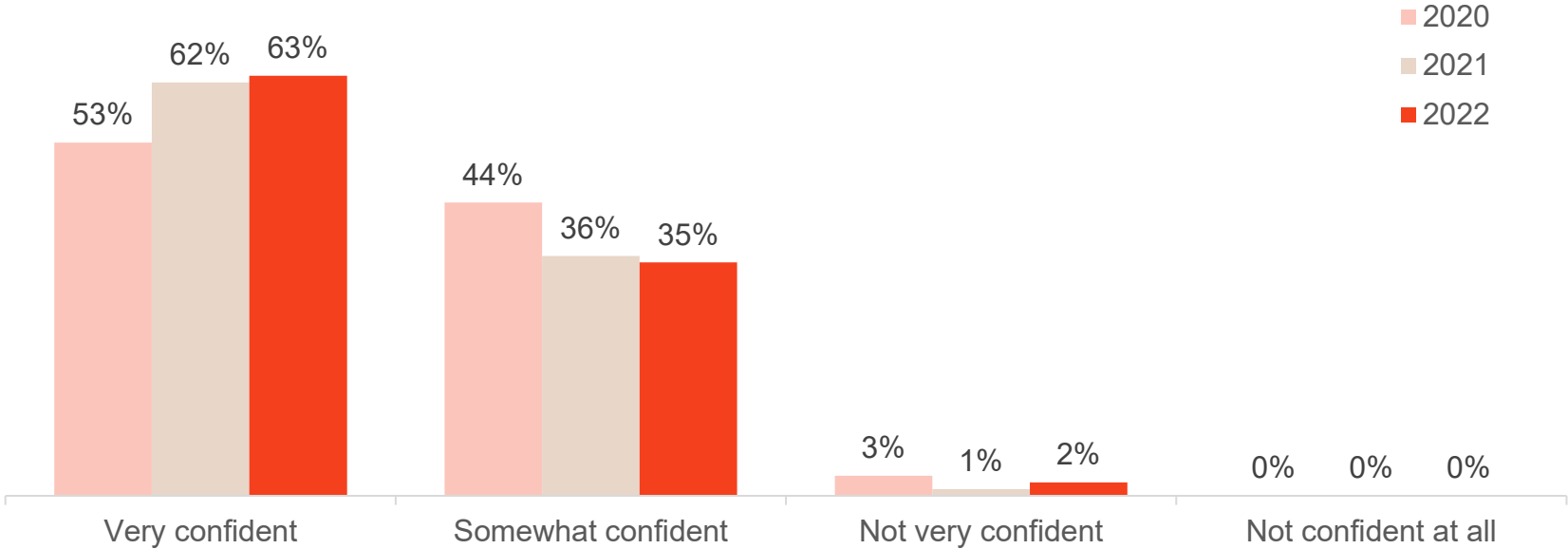
Most trustees feel very confident in their own ability to protect their charity from wrongdoing, particularly trustees from smaller charities

My ability to protect my own charity and its beneficiaries from wrongdoing and harm



And as last year, almost all trustees are at least somewhat confident that they are able to protect their charity

My ability to protect my own charity and its beneficiaries from wrongdoing and harm

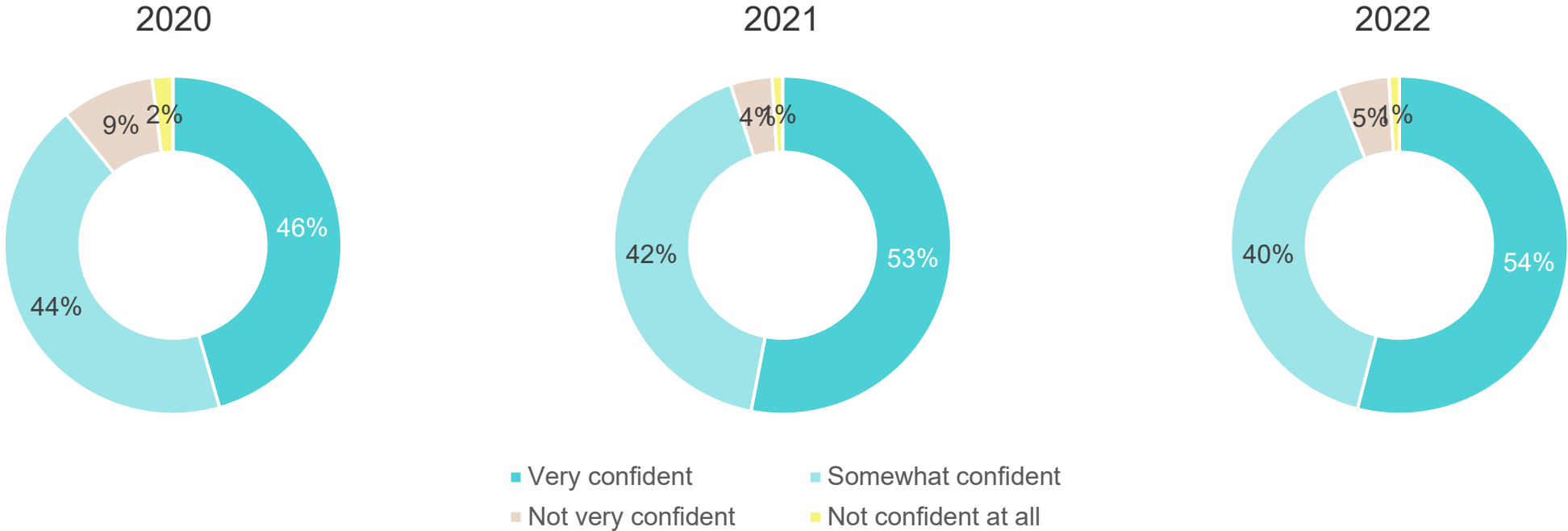


Trustees continue to see the
Commission as **better at dealing with
wrongdoing than uncovering it.**

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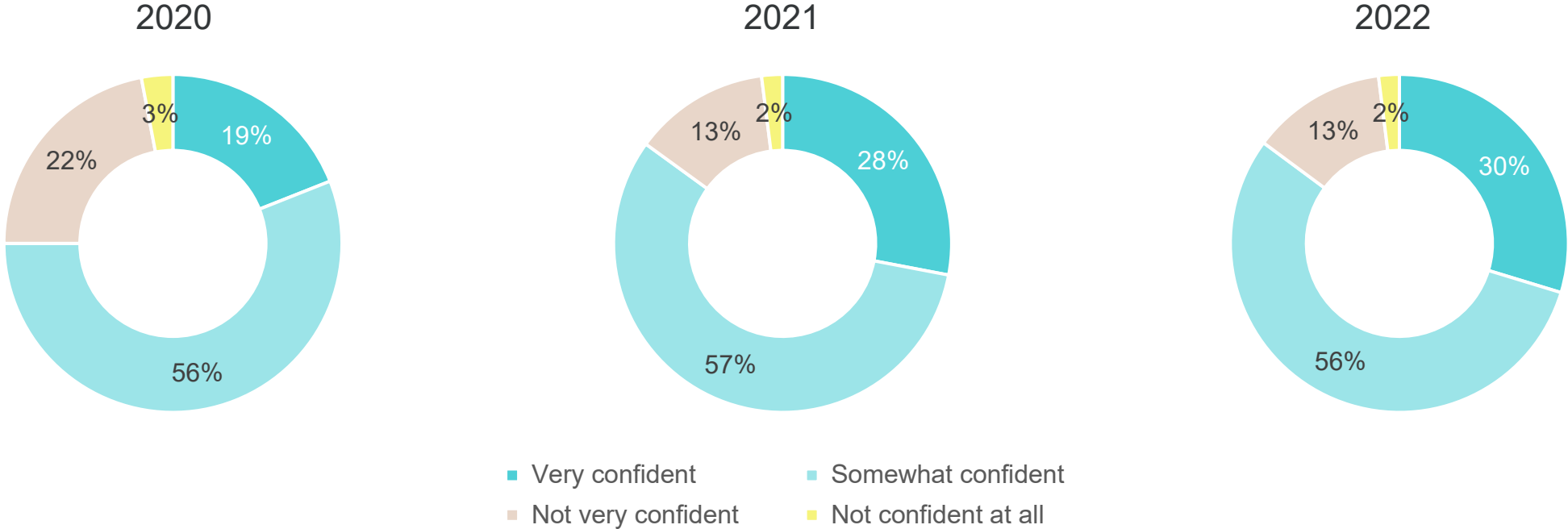
The majority of trustees are still very confident that the Commission will deal appropriately with wrongdoing once uncovered

That instances of wrongdoing and harm once uncovered will be dealt with appropriately by the Charity Commission



There is also confidence that the Commission is able to uncover wrongdoing and harm, though less than for its ability to deal with it

The Charity Commission's ability to uncover wrongdoing and harm when they occur in other charities

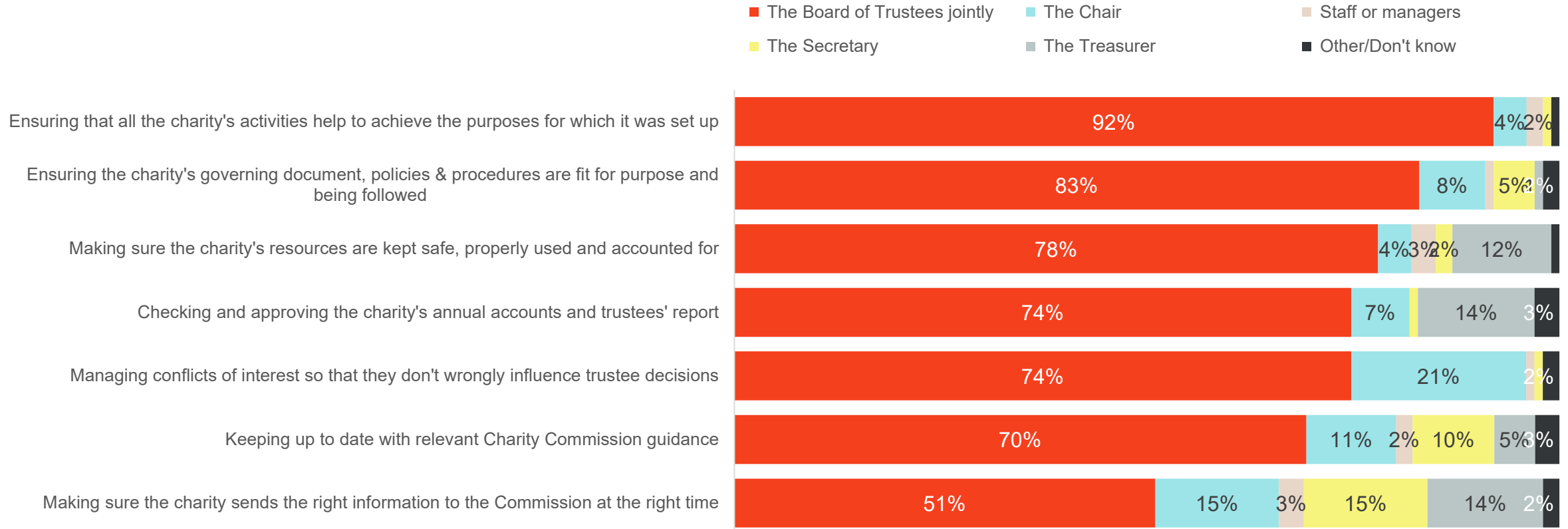


Trustees typically understand that various governing activities are the collective responsibility of trustees, but many think that specific individuals are responsible for keeping the Commission up to date.

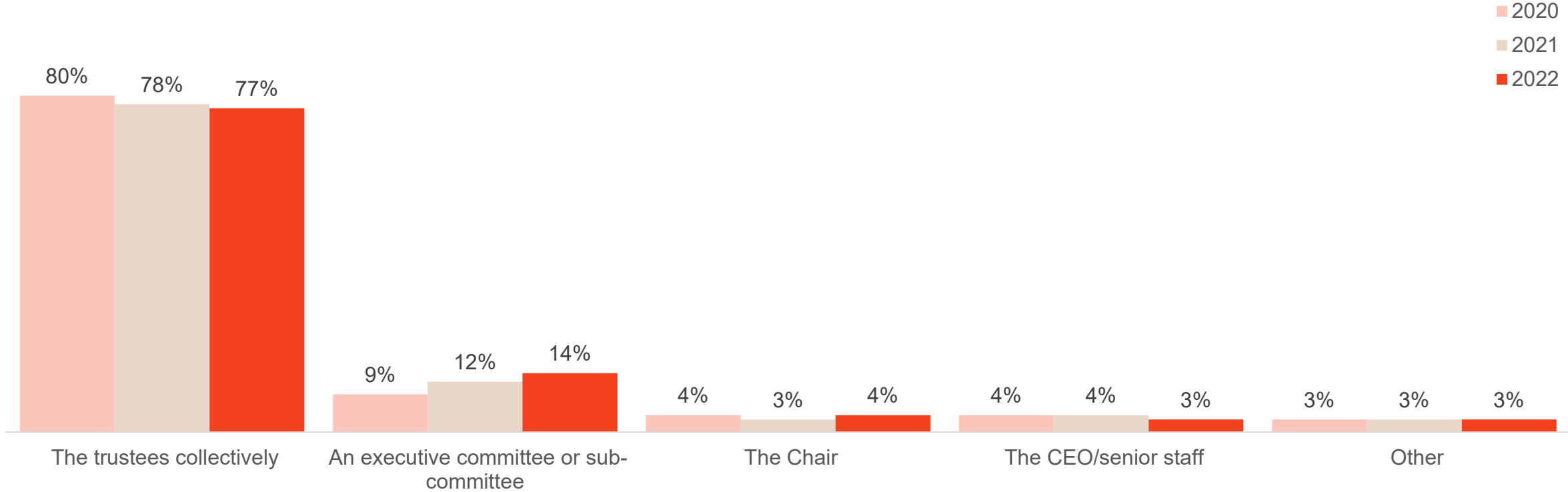
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Except for a few areas, they are generally confident about how decisions should or should not be made.

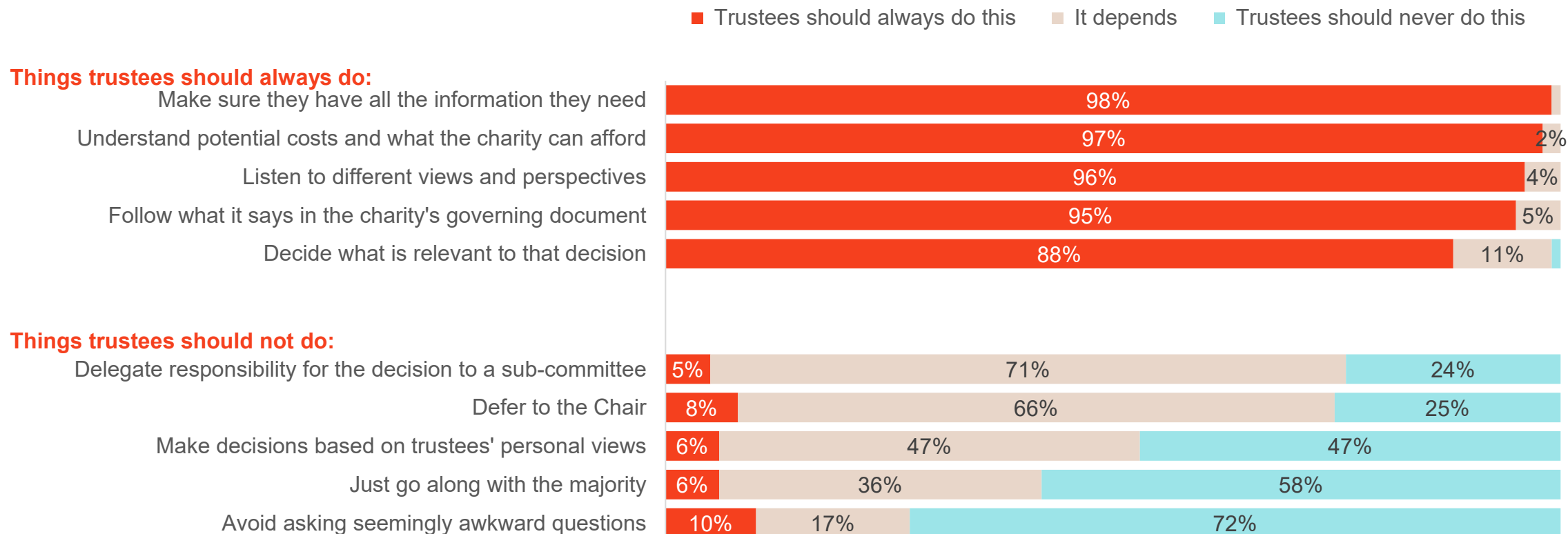
Trustees see most governance tasks as their responsibility, but some don't recognise their shared responsibility for accounts or updating the Commission



Almost a quarter of trustees say it is an individual or a committee that makes important decisions, rather than the trustees collectively



Trustees continue to be clear on most ‘dos’ and ‘don’ts’ in decision making, but some are unsure about delegating responsibility or deferring to the chair

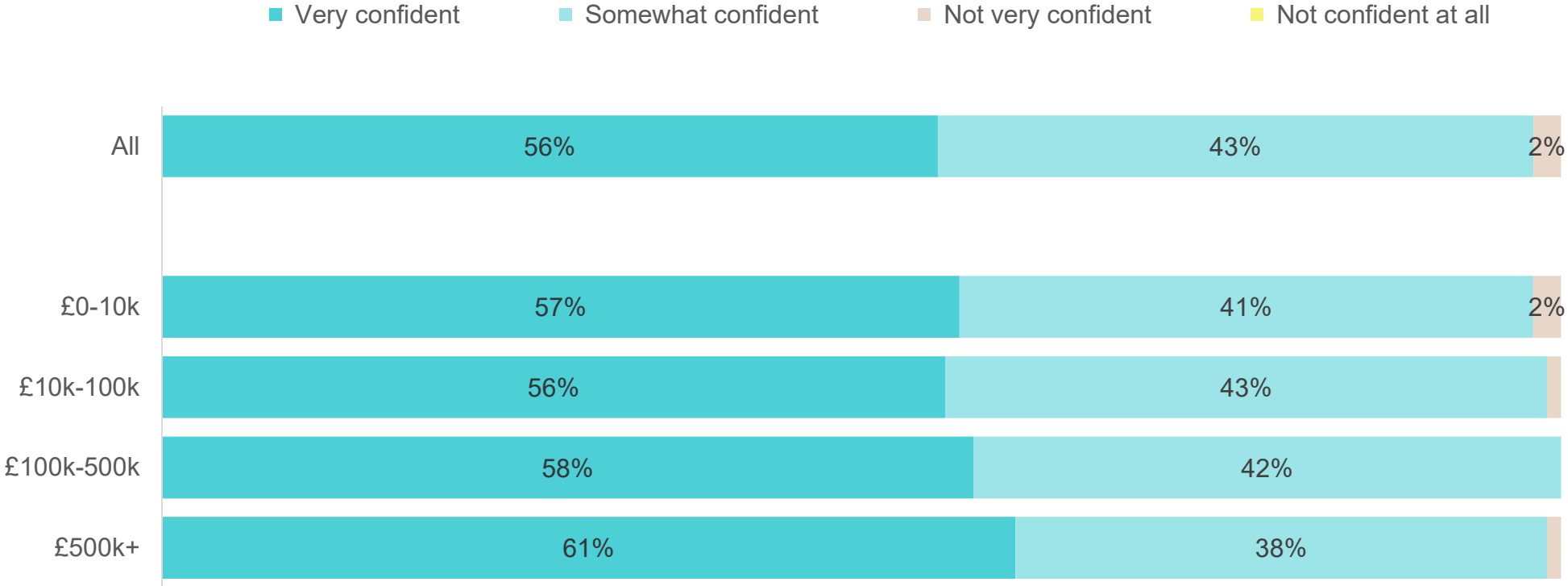


Trustees remain confident in how they govern charities and their understanding of conflicts of interest is generally sound.

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Understanding how to navigate the regulations around charities is still the area where help is most desired.

Confidence has remained high. Most trustees are ‘very confident’ in their role, especially those from larger charities

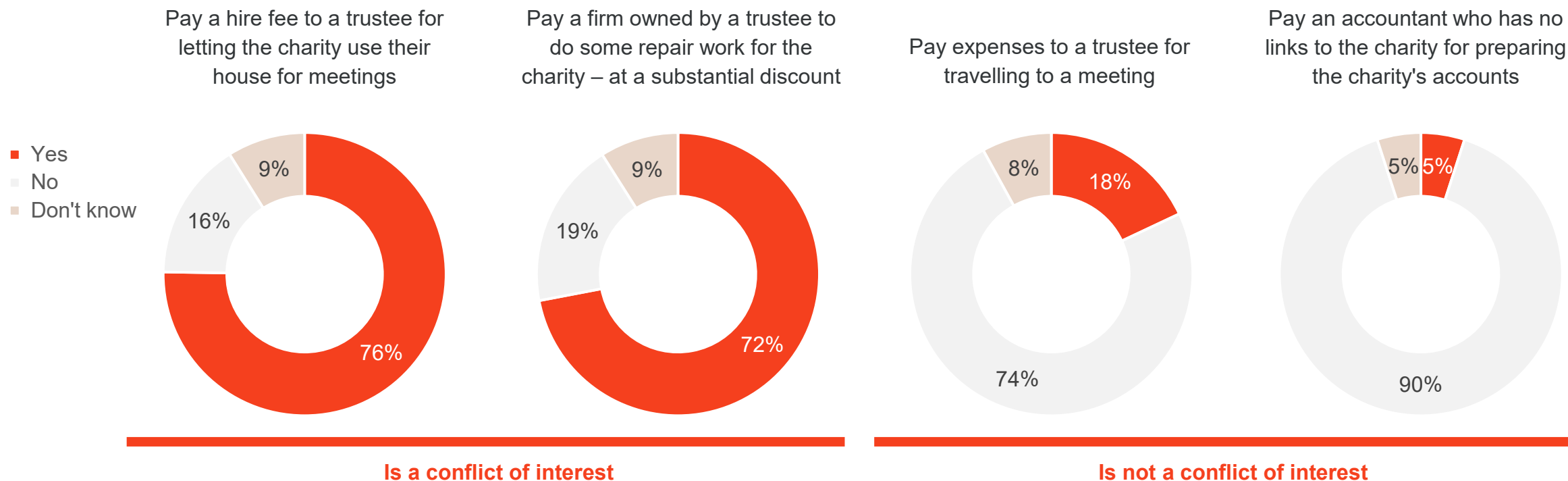


Trustees are generally comfortable with their responsibilities, but time pressures have increased since last year

	Statement A (0-4)		Neutral (5)		Statement B (6-10)	
<i>Responsibilities</i>	7%	I find my responsibilities for the charity overwhelming	6%	I am comfortable with the responsibilities I have for the charity	86%	▼ -1%
<i>Time</i>	16%	I feel like I don't have enough time to properly carry out everything I need to in my role	9%	I feel like I have time to properly carry out everything I need to in my role	75%	▼ -5%
<i>Regulations burden</i>	11%	There are too many unnecessary rules and regulations for trustees to comply with	11%	The rules and regulations trustees have to comply with are important, and are not too much of a burden	78%	▼ -2%

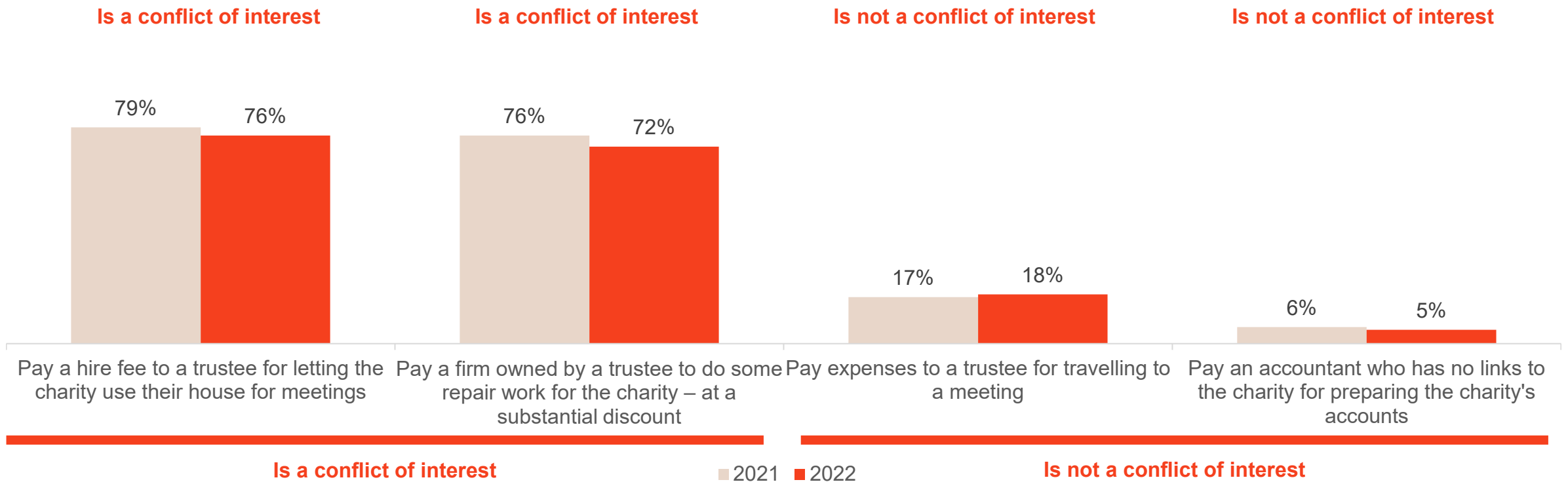
On the whole, trustees have a good understanding of what qualifies as a conflict of interest, but claiming for expenses is a blind-spot for some

Is it a conflict of interest to...

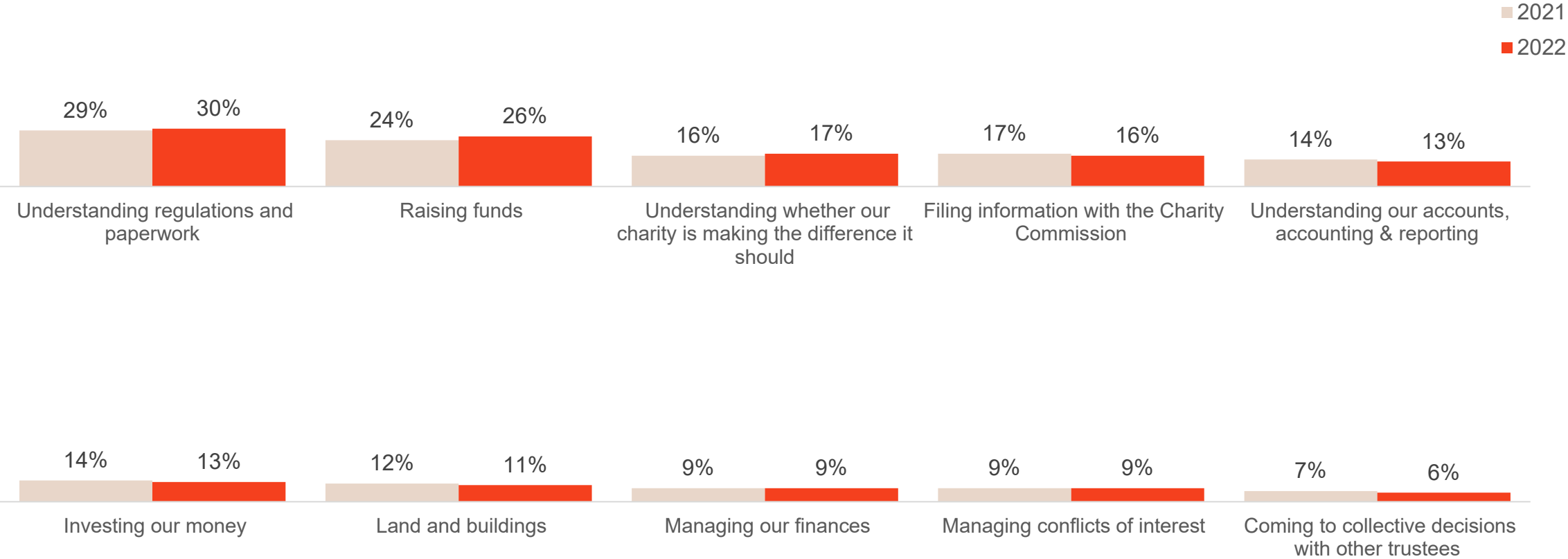


Trustees' levels of understanding around conflicts of interest have remained broadly stable since 2021

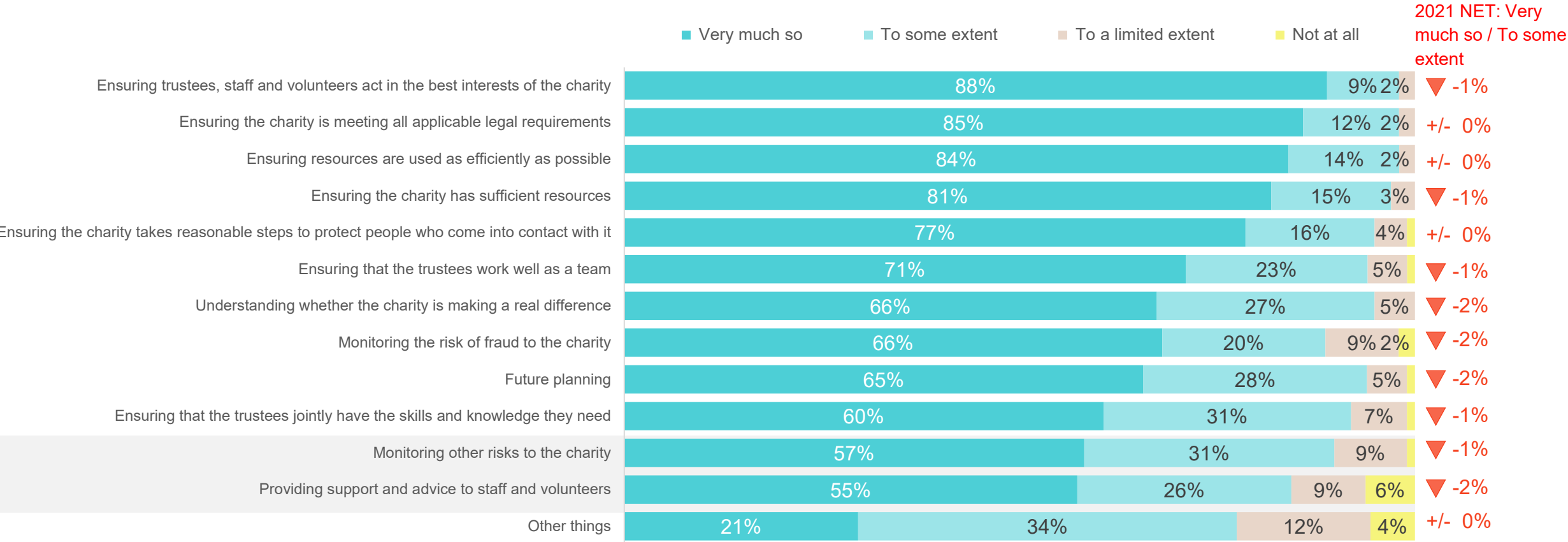
Answered yes to 'Is it a conflict of interest to...'



As last year, trustees' needs are varied, but help with understanding regulations and paperwork would be most appreciated



Trustees consider themselves to have a broad range of tasks, though there is less emphasis on the key issues of monitoring for fraud and managing risks

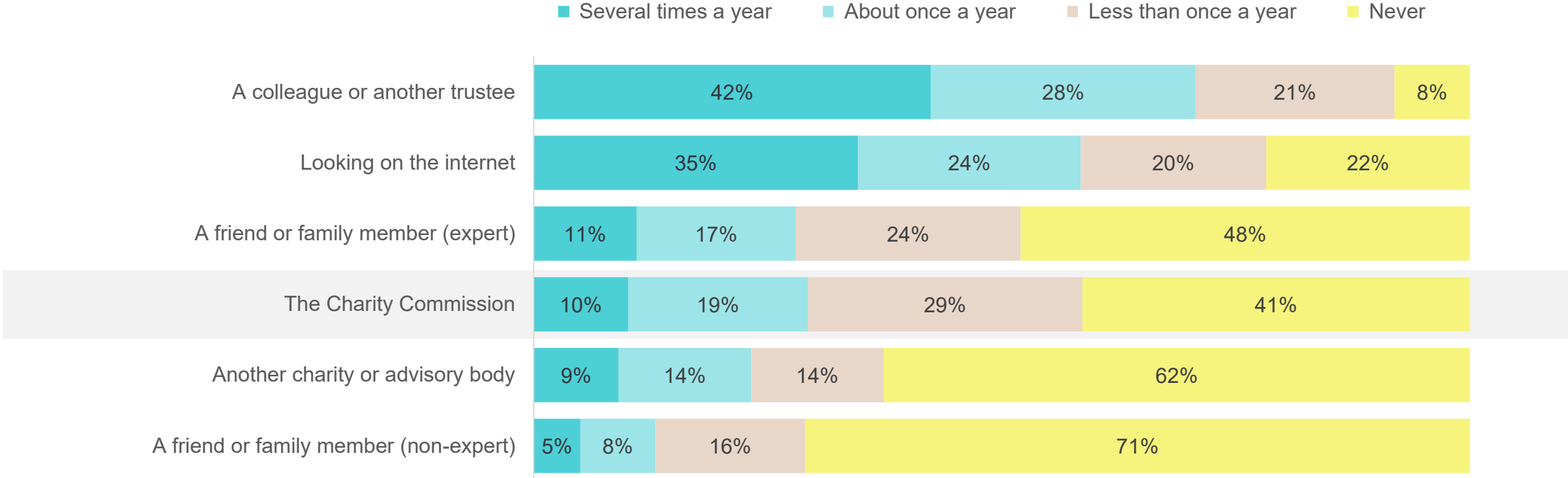


The Charity Commission is typically not the first port of call for guidance, but when it is used it is deemed helpful.

Those who use the Charity Commission for guidance, have a greater understanding of the support available and their duties.

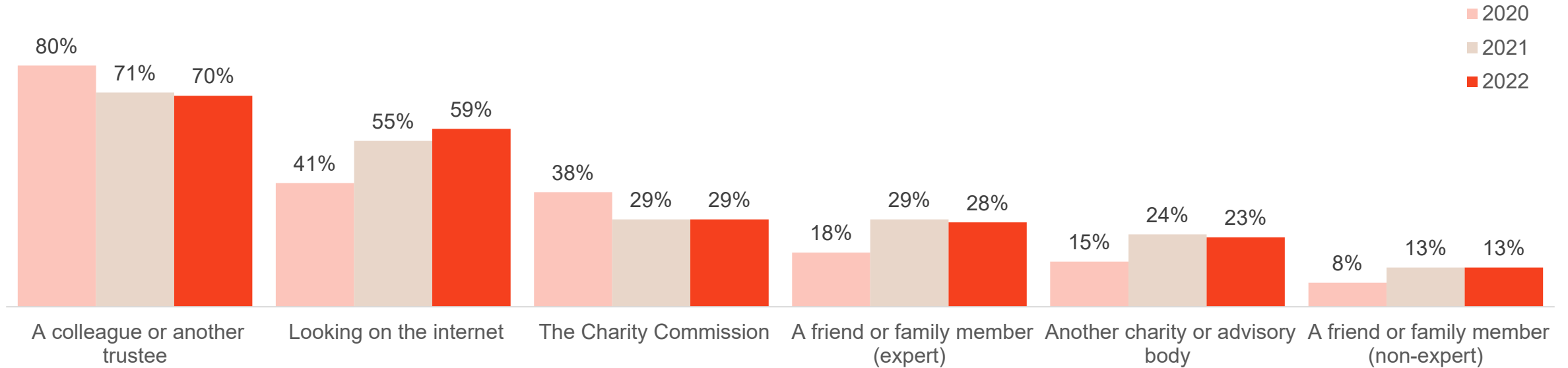
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Trustees are twice as reliant on colleagues or other trustees and the internet as they are on the Commission for guidance



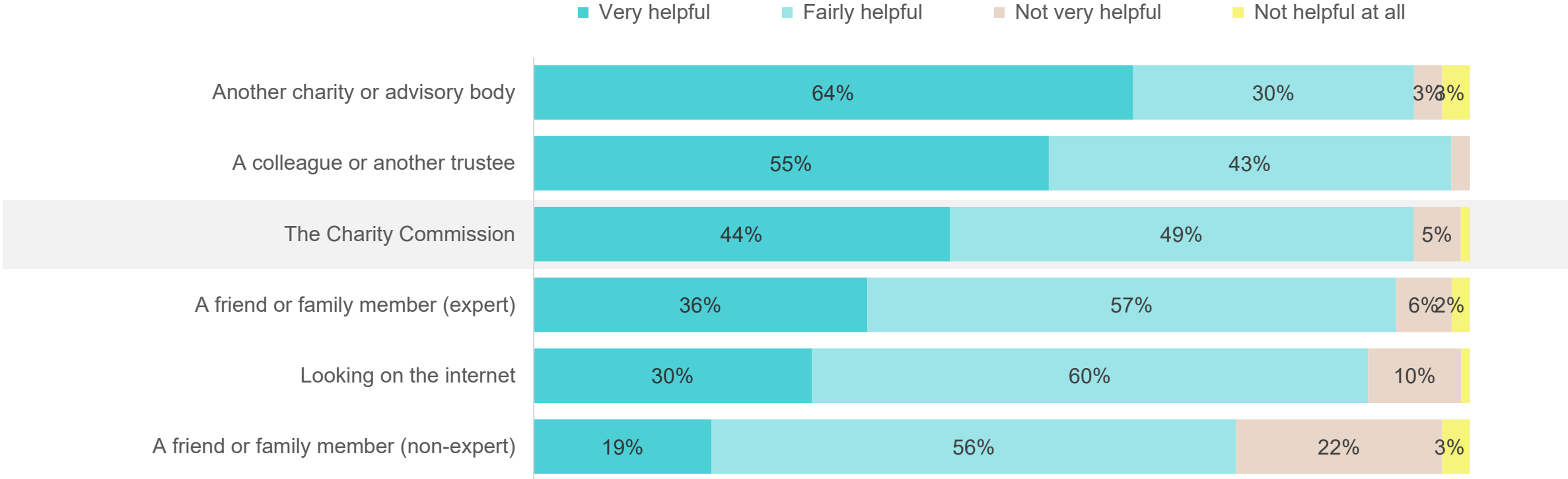
Reliance on the Commission is stable while the proportion of trustees turning to the internet for guidance continues to increase

Answered 'several times a year' or 'about once a Year'



Those who do go to the Charity Commission for guidance tend to find it helpful

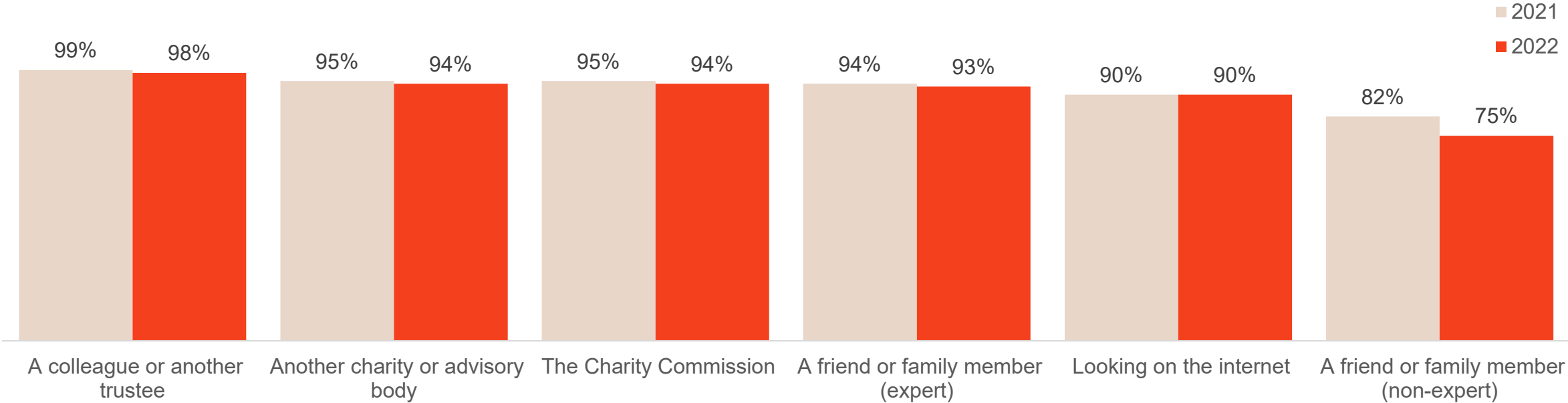
Among those who had used each...



Q. You said you had used the following sources for help or guidance. How helpful did you find them? Base: another charity or advisory body (3,371), a colleague or another trustee (1,421), The Charity Commission (2,192), a friend or family member (expert) (1,914), looking on the internet (2,863), a friend or family (non-expert) (1,075)

The advice of colleagues and other trustees continues to be seen as the most helpful

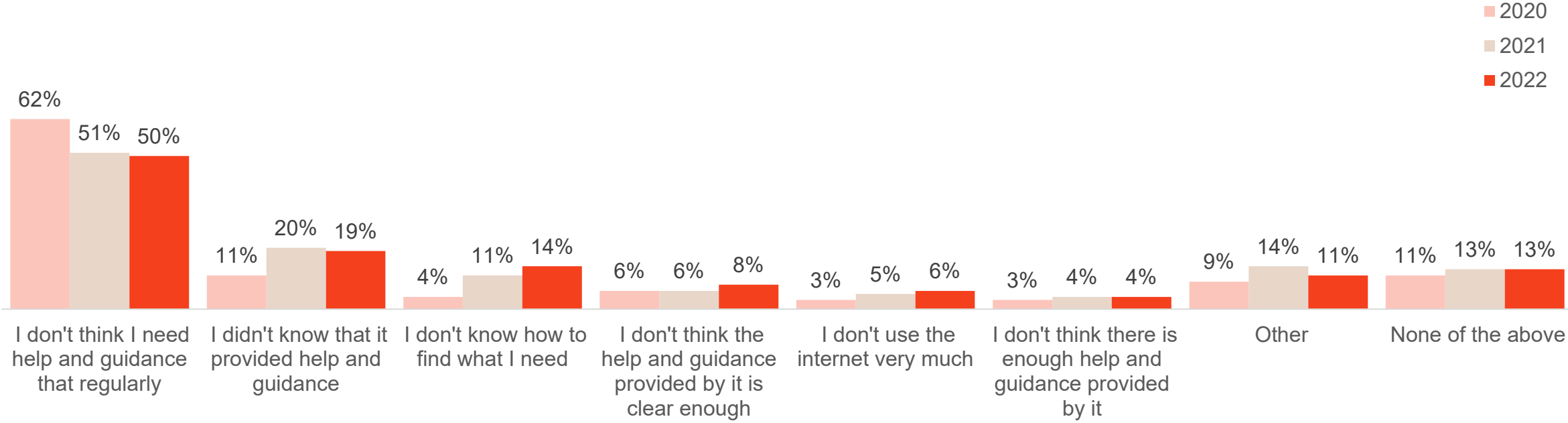
Answered 'very helpful' or 'fairly helpful'



Q. You said you had used the following sources for help or guidance. How helpful did you find them? Base: another charity or advisory body (3,371), a colleague or another trustee (1,421), The Charity Commission (2,192), a friend or family member (expert) (1,914), looking on the internet (2,863), a friend or family (non-expert) (1,075)

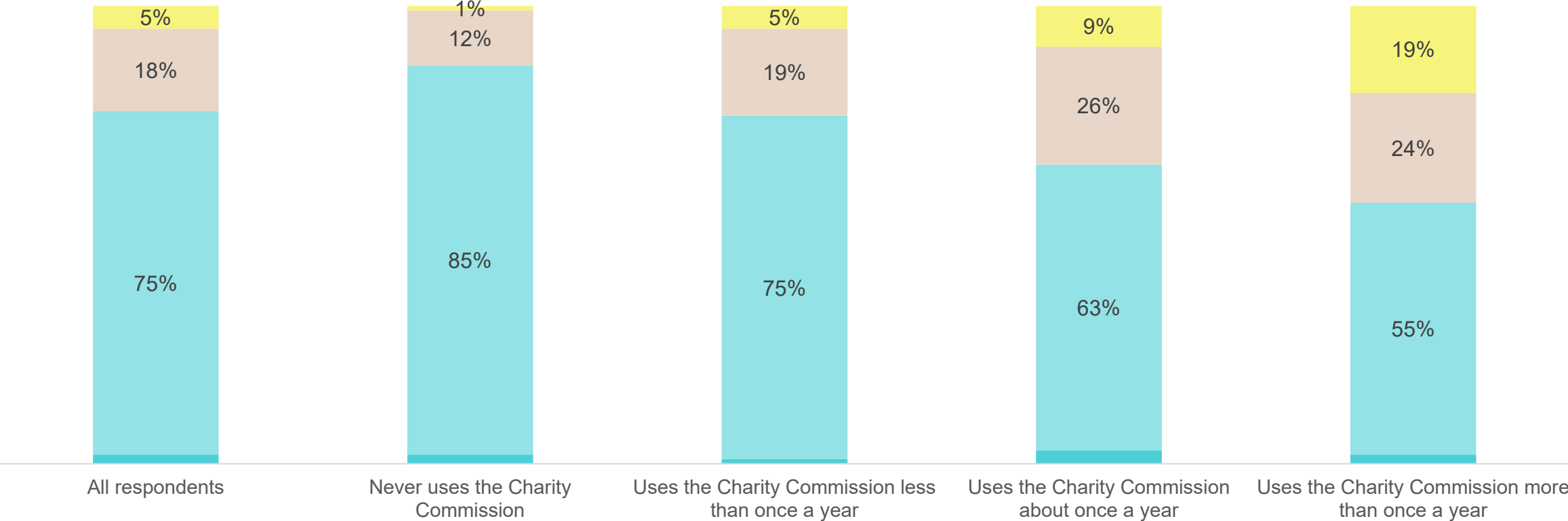
As in previous years, those who do not go to the Charity Commission for advice tend to say it is because they don't often feel in need of help

Reasons for not using Charity Commission guidance, among those who used it less than once a year or never

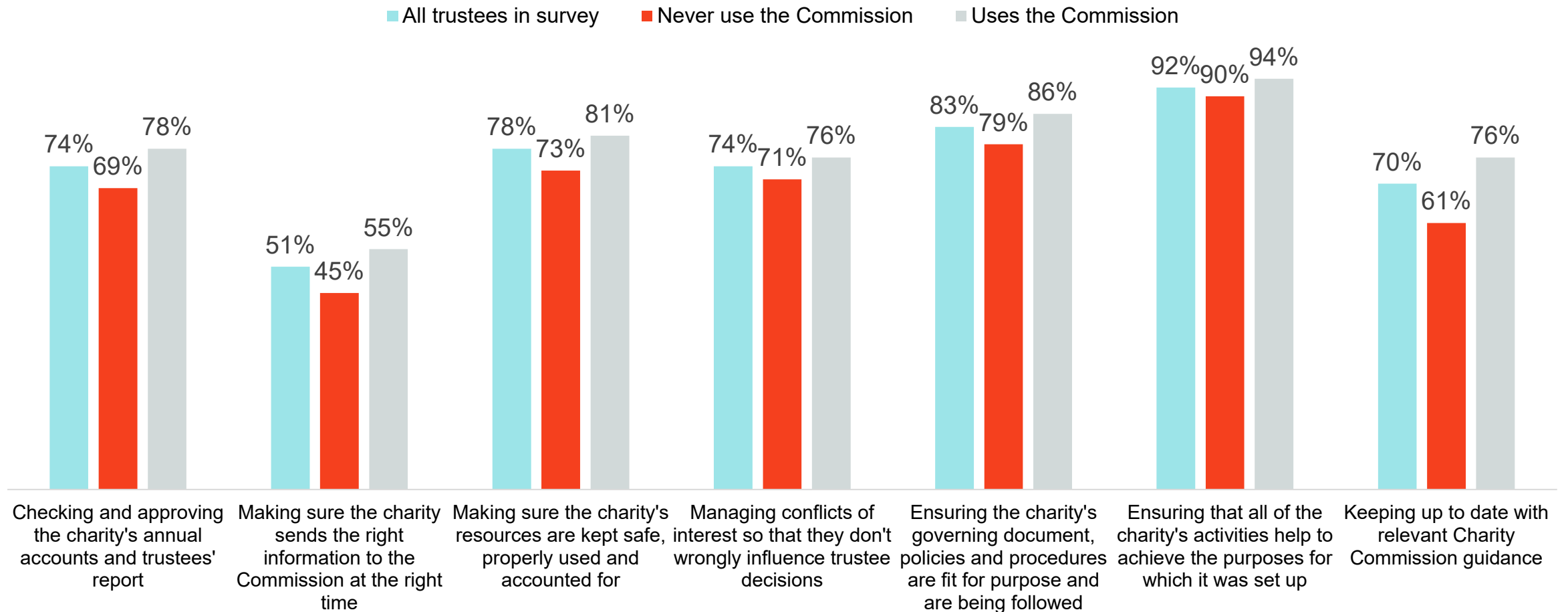


Whilst most trustees were not aware of the 5-minuts guides, usage increased with interaction with the Charity Commission

■ Don't know ■ Had not heard of them ■ Had heard of them, but have not used in the past year ■ Had heard of them, and used in the past year



Trustees who use the Charity Commission are more likely to correctly understand their duties



Methodology

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Quantitative survey of trustees

- + Yonder conducted an online survey of 3,662 participants taken from the Charity Commission's database of charity trustees. These trustees came from a range of charity types, regional areas of focus, and length of tenure.
- + Where relevant, answer options were randomised and scales rotated. All questions using opposing statements were asked using a sliding scale.
- + The data was weighted to be representative of the breakdown of income size on the Commission's register.

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