

Trustee research – March 2023

For the Charity Commission for England and Wales

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CHARITY COMMISSION
FOR ENGLAND AND WALES

Executive summary

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Executive summary

- + **Trustees' understanding of their role and confidence in performing it remains high.** Trustees feel able to align appropriately with public expectations and protect charities and their beneficiaries from harm. A vast majority of trustees prefer caution over risk in their approach to spending, while a similar proportion feels it should be a charity's core purpose rather than trustees' judgement that guides their decisions.
- + **The majority of trustees are confident that the boards they sit on reflect the views of all stakeholders.** Smaller charities appear to rely largely on organic means of trustee recruitment, while larger charities also employ more formal processes.
- + **Trustees want and, for the most part, perceive balance in the Commission's regulatory approach.** Those who do not feel the Commission is balanced are evenly split between those who see more emphasis on dealing with wrongdoing and those who see more emphasis on helping charities do things the right way. Those who have had relevant dealings with the Commission feel for the most part that they have been dealt with fairly.
- + **Charity law is seen as having the greatest influence on the Commission,** yet some trustees also see other influences at work. The strongest sense, both of influence and non-influence from elsewhere, comes from those who use the Commission most.
- + **The Charity Commission is not the main source of advice and guidance,** but it is found to be useful by those who exploit it. Trustees continue to turn first to colleagues and other trustees or to the internet for advice and guidance.

Trustees continue to feel that they understand public expectations, and favour a cautious approach to managing funds

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Though the public and trustees are broadly aligned in their views of the charity sector, the public tend to be more strongly opposed to high executive pay and less convinced that charities' means are as important as their ends



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Q. Please read the following pairs of statements. In each case, please indicate which statement you agree with, using a 0-10 scale on which 0 means you completely agree with statement A, and 10 means you completely agree with statement B. Base: trustees (3,473), public (4,316). Question wording slightly adapted for public survey.

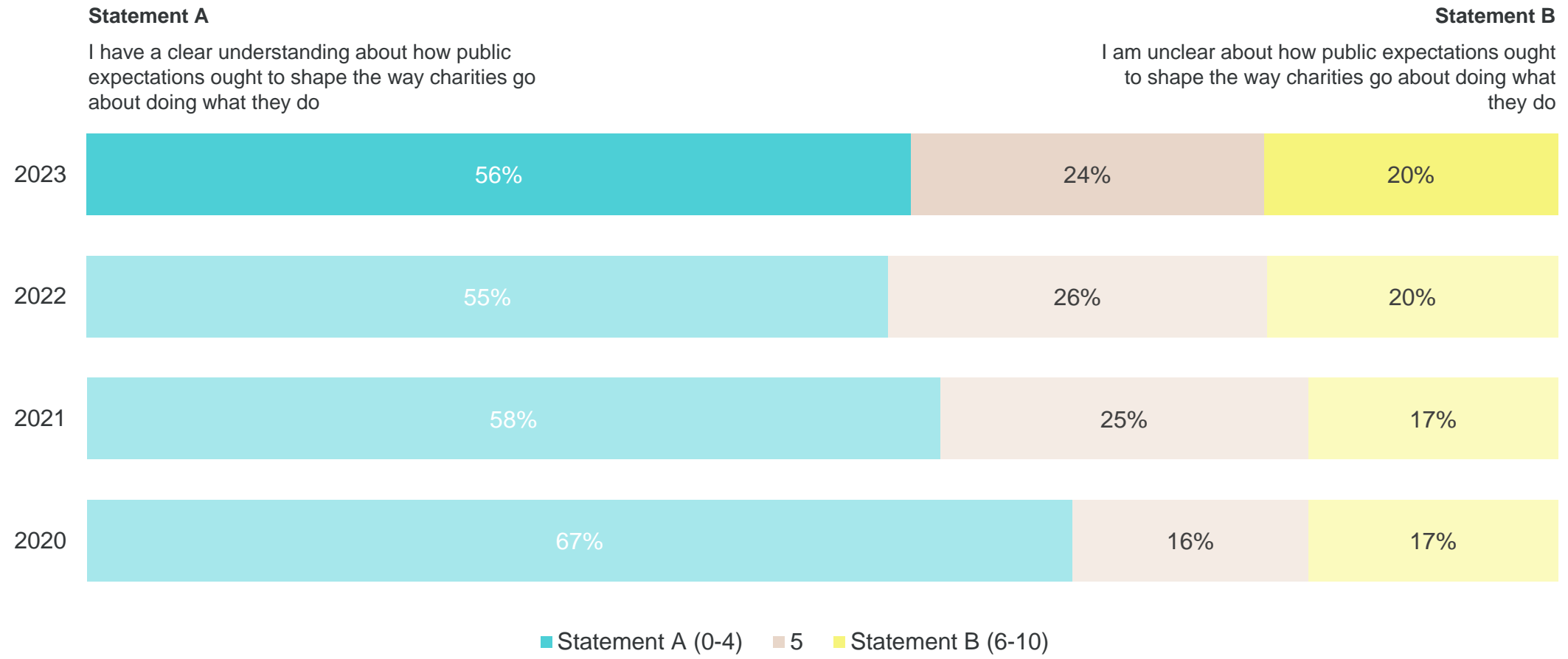
The public and trustees agree that charities should be able to campaign for social change, but the public are less sure that charities need to respond to social and cultural debates



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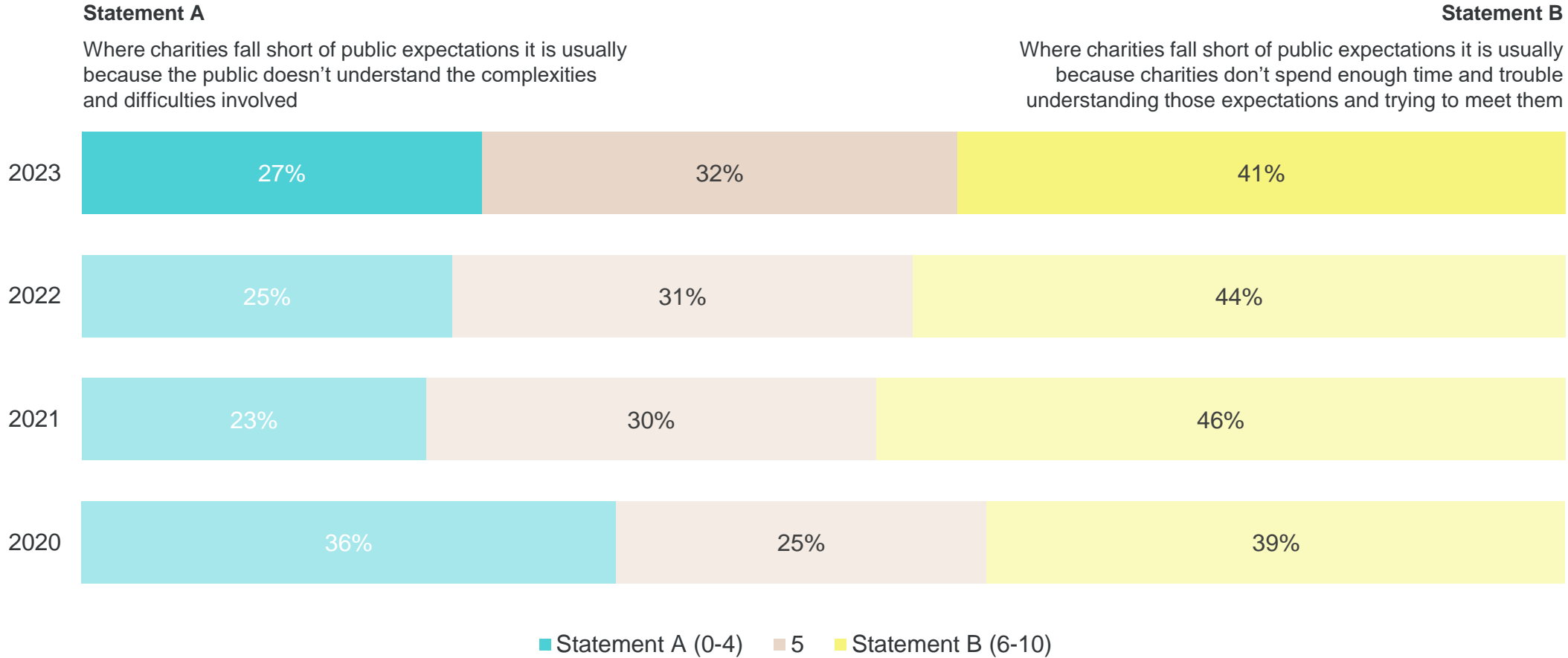
Trustees continue to feel that they understand the impact public expectations ought to have on charities, though they remain less sure than in 2020



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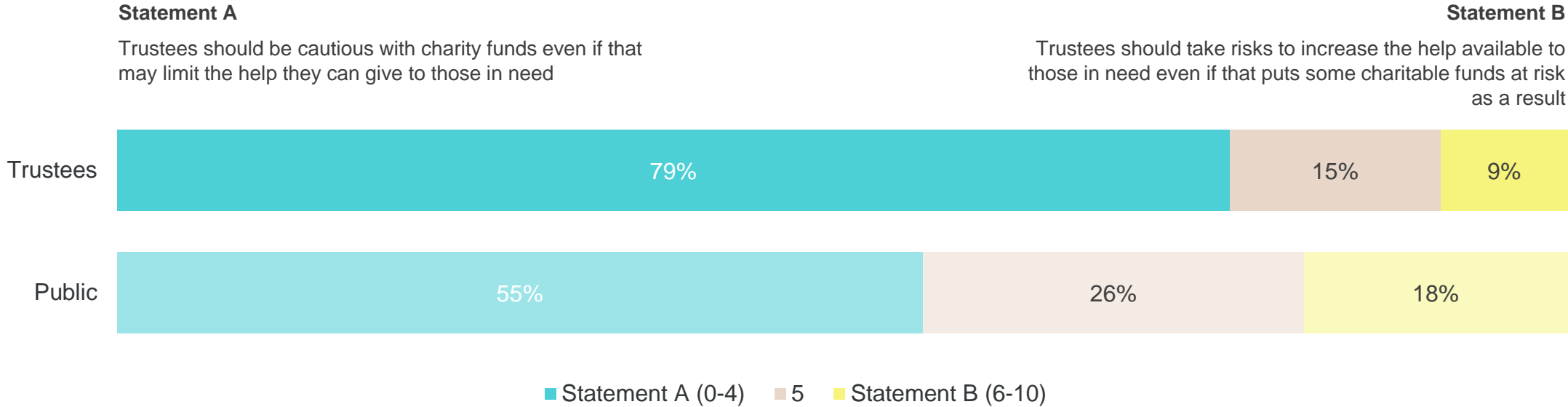
Trustees believe that when charities don't meet public expectations, this is more likely due to charities not taking care to meet those expectations rather than public lack of knowledge on charity complexity



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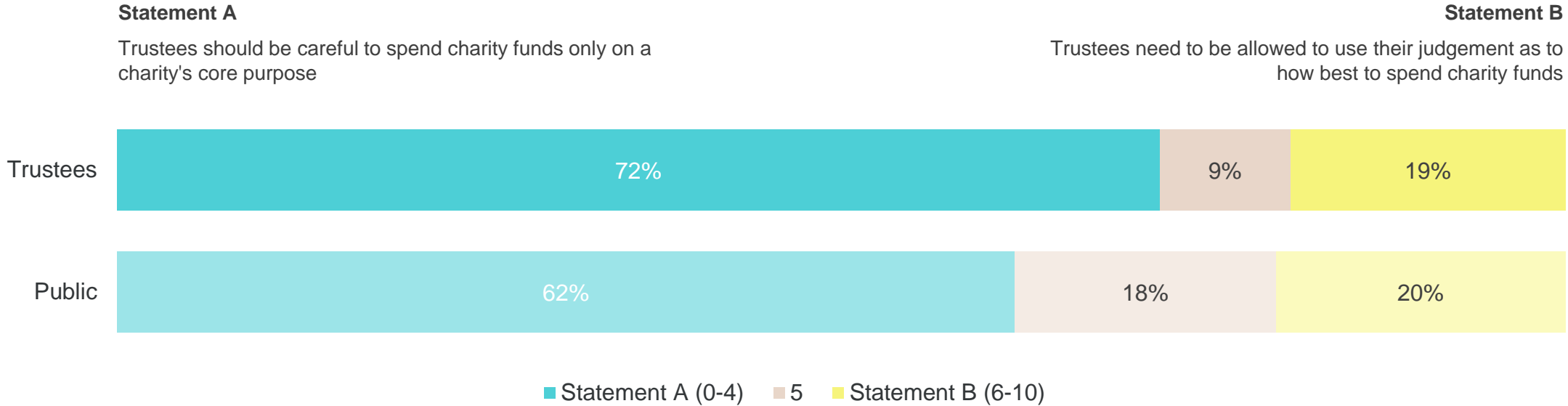
The vast majority of trustees align with the public's preference in favouring caution over risk-taking in their managing of charity funds



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When deciding how to spend charity funds, trustees put the charity’s core purposes ahead of their own judgement, as indeed the public prefer

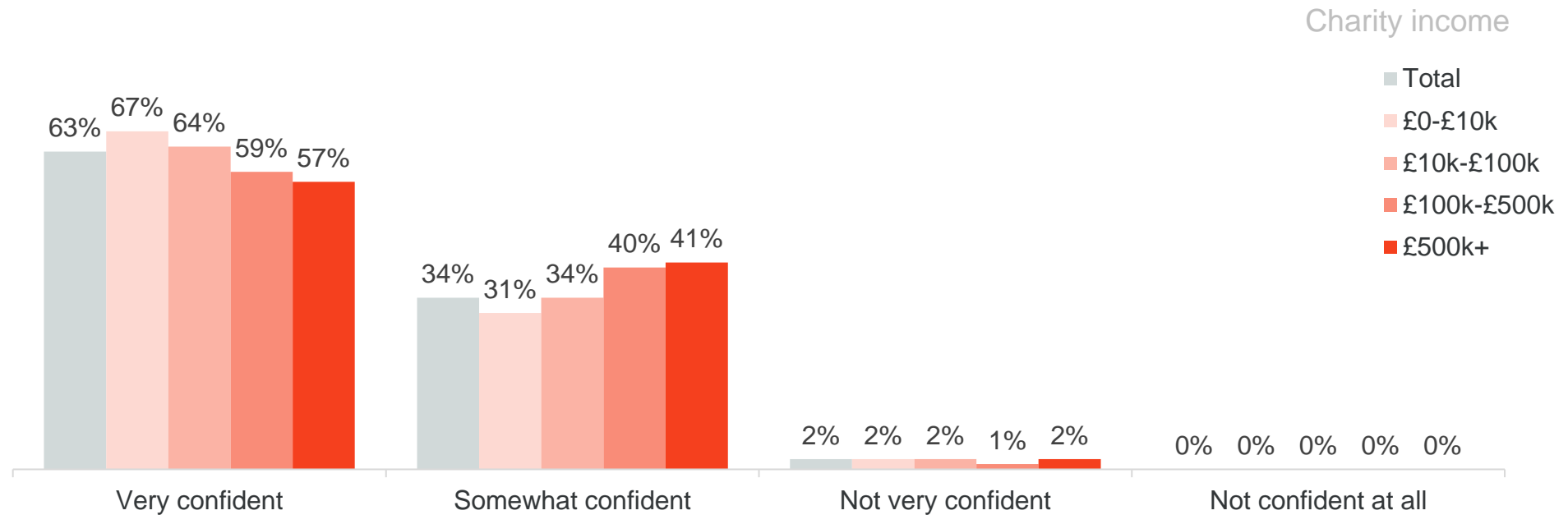


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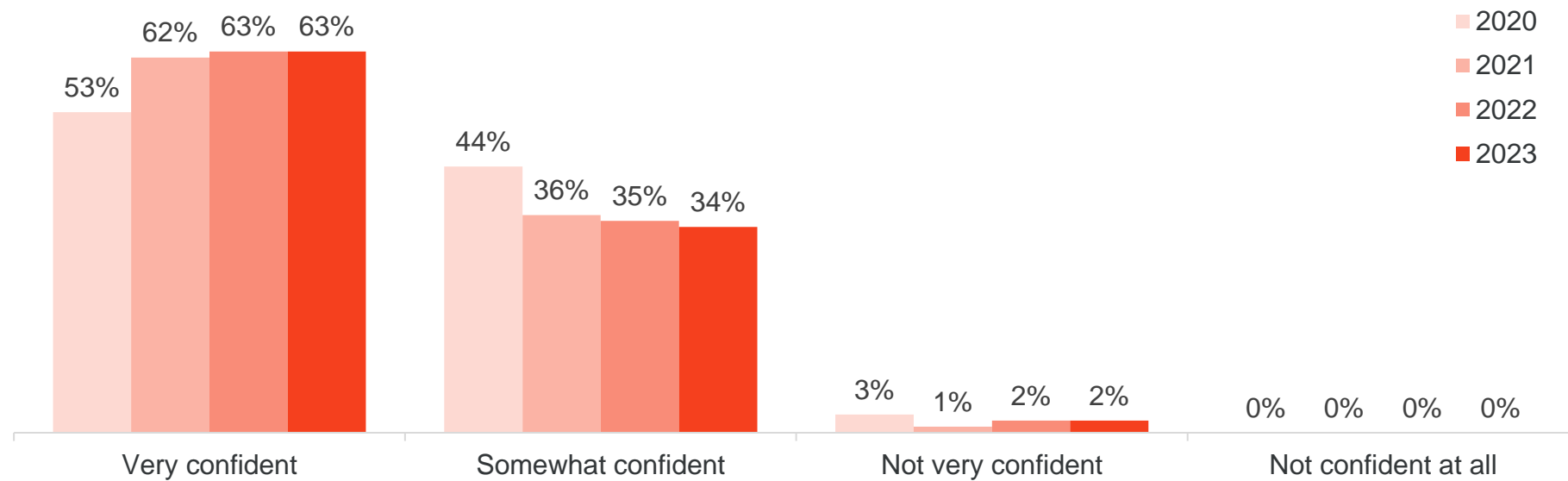
Trustees from charities of all sizes, but particularly smaller ones, are confident they can protect their charities and beneficiaries from wrongdoing and harm...

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



... And have felt this way for the last four years

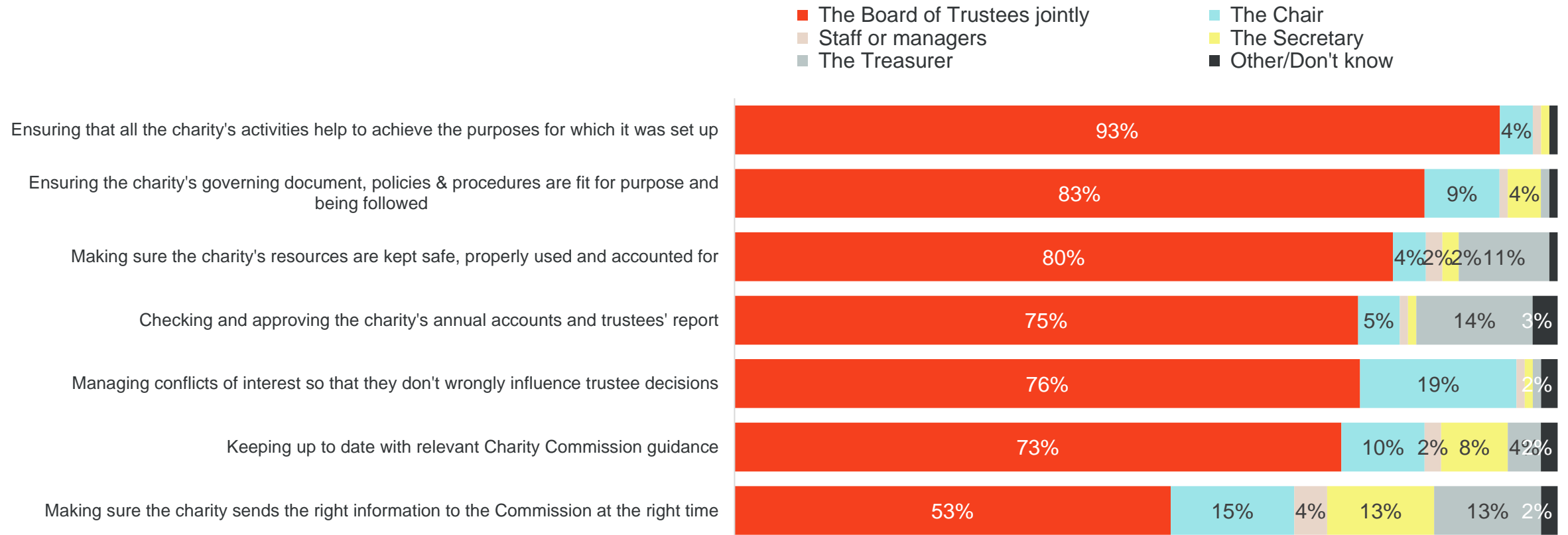
My ability to protect my own charity and its beneficiaries from wrongdoing and harm



Most trustees understand that important governing activities are the collective responsibility of trustees, though there is some uncertainty around delegating to sub-committees and making decisions based on personal views

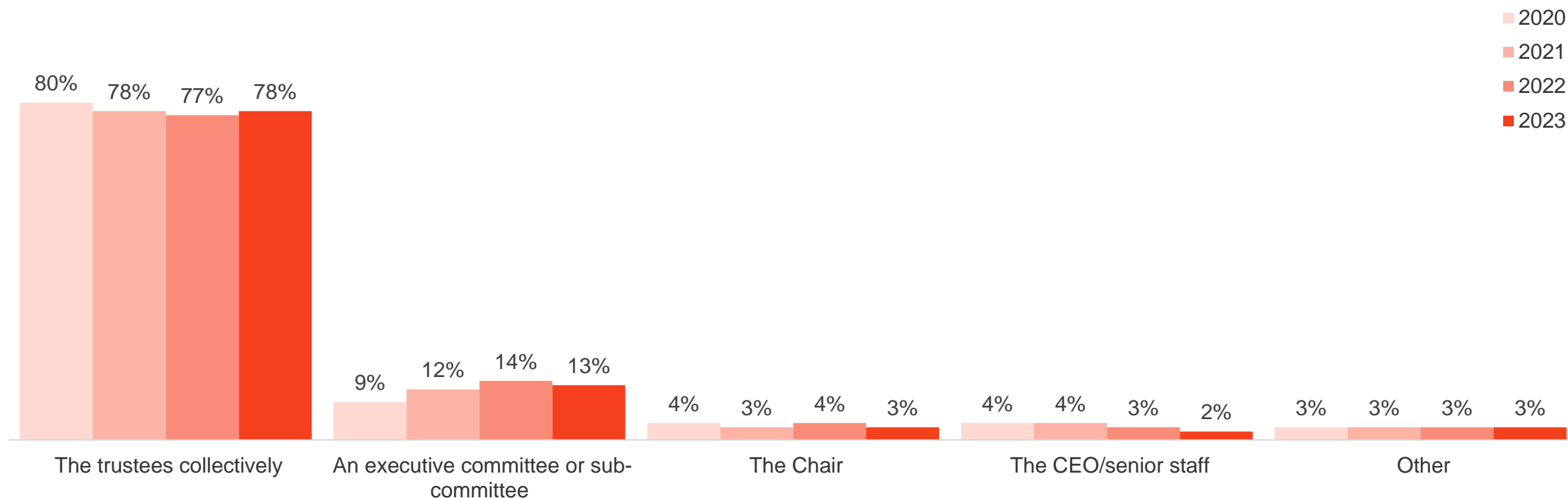
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Trustees generally recognise charity governance as their responsibility, but only half include 'making sure the right information is sent to the Commission at the right time' within that role

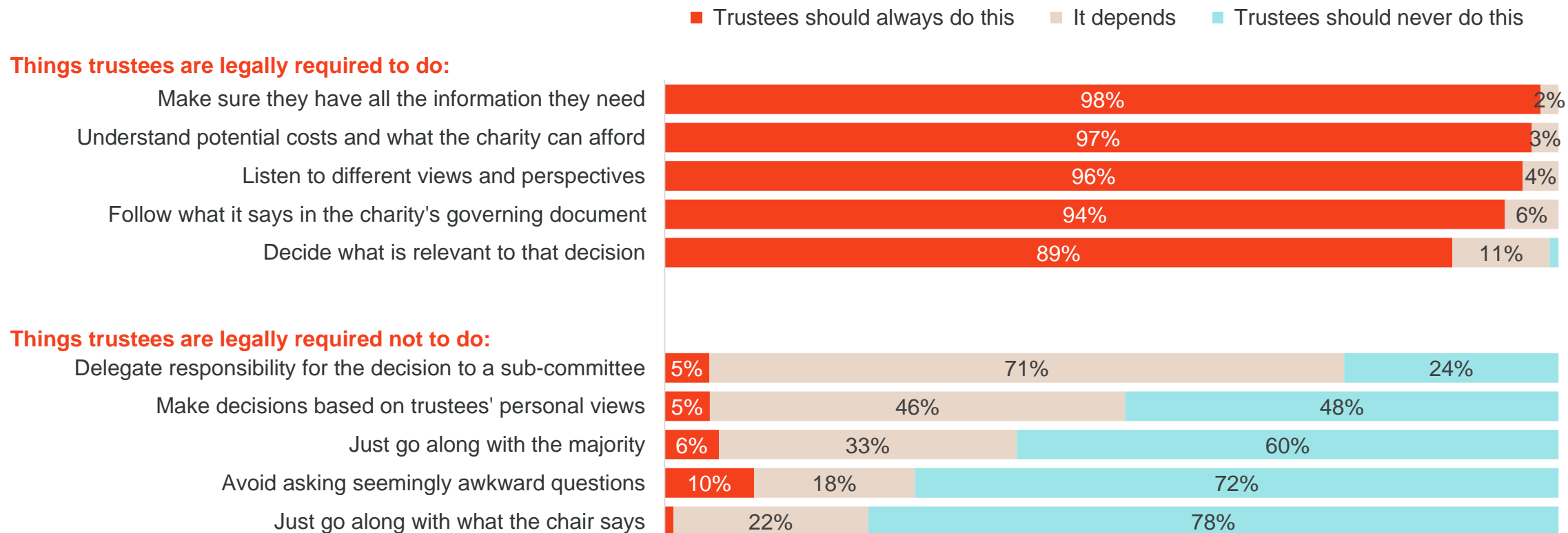


Eight-in-ten trustees continue to see it as the role of trustees collectively to make the important decisions in their charities

Legal responsibility of the board of trustees: *Making important decisions collectively*



There is generally little confusion about what trustees should and should not do, though many believe that they can sometimes delegate responsibility for their decisions



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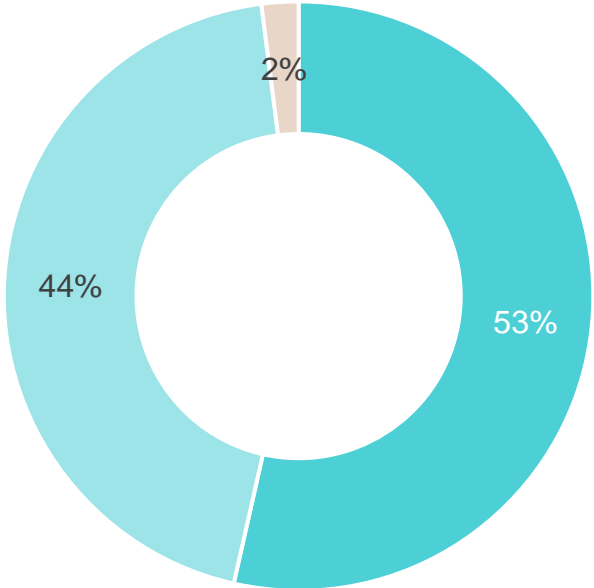
Q. On a 0-10 scale where 0 means strongly disagree and 10 means strongly agree, can you tell us how strongly you agree or disagree with each of the following. Base (3,473)

**Confidence in how to govern charities
remains high and trustees generally
have a good understanding of conflicts
of interest**

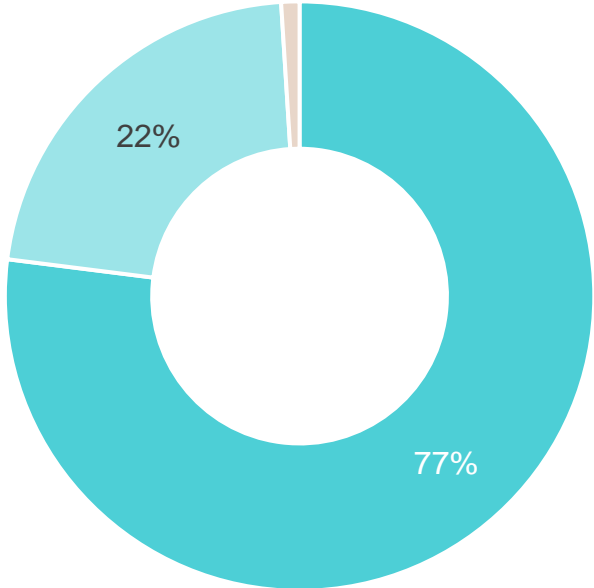
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Trustees are confident in their ability to help govern their charity and ensure it fulfils its purpose

... in helping to manage or govern your charity in your role?



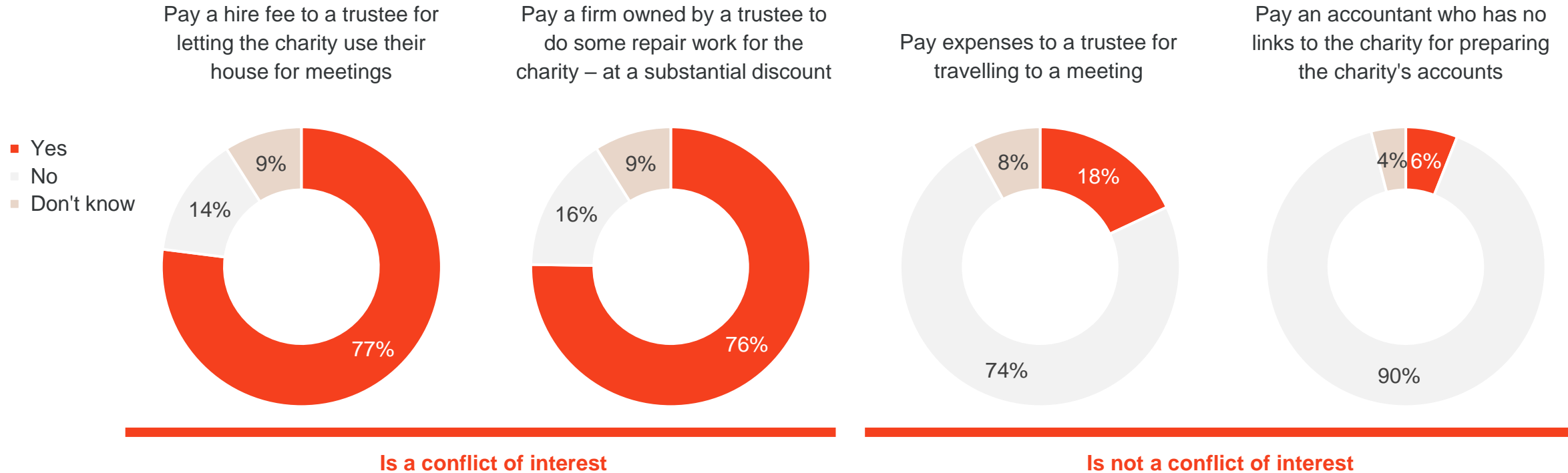
... that your Board of Trustees ensures that your charity fulfils its purpose?



■ Very confident ■ Somewhat confident ■ Not very confident ■ Not confident at all

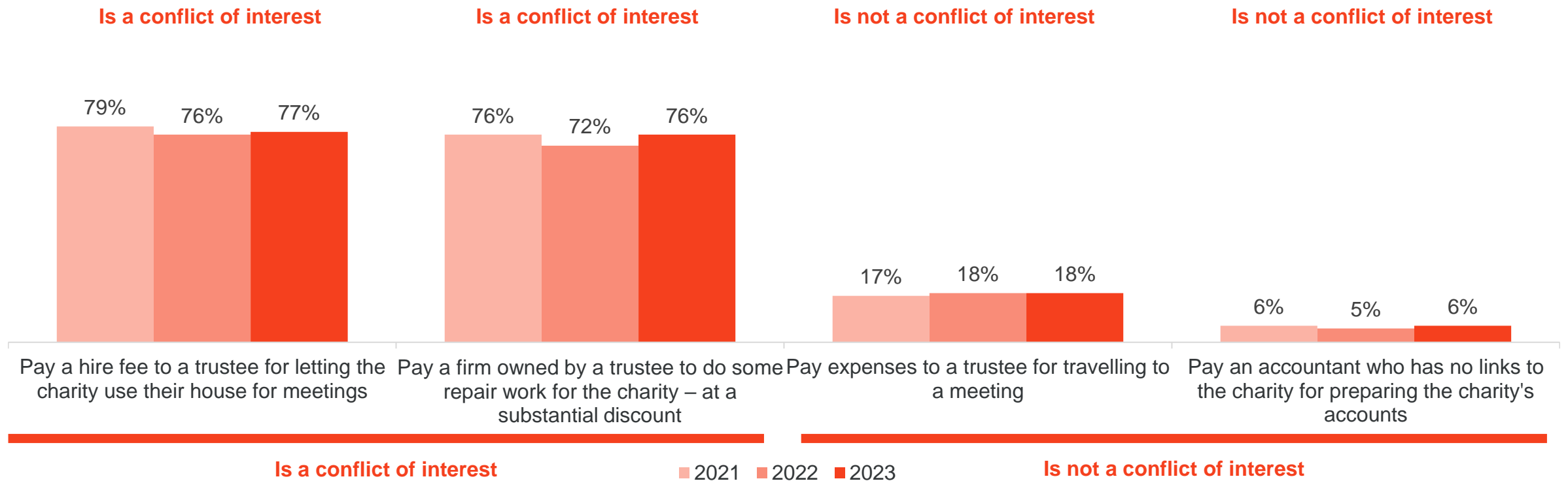
Trustees generally understand what constitutes a conflict of interest

Is it a conflict of interest to...



Understanding around conflicts of interest has remained largely unchanged since 2021

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

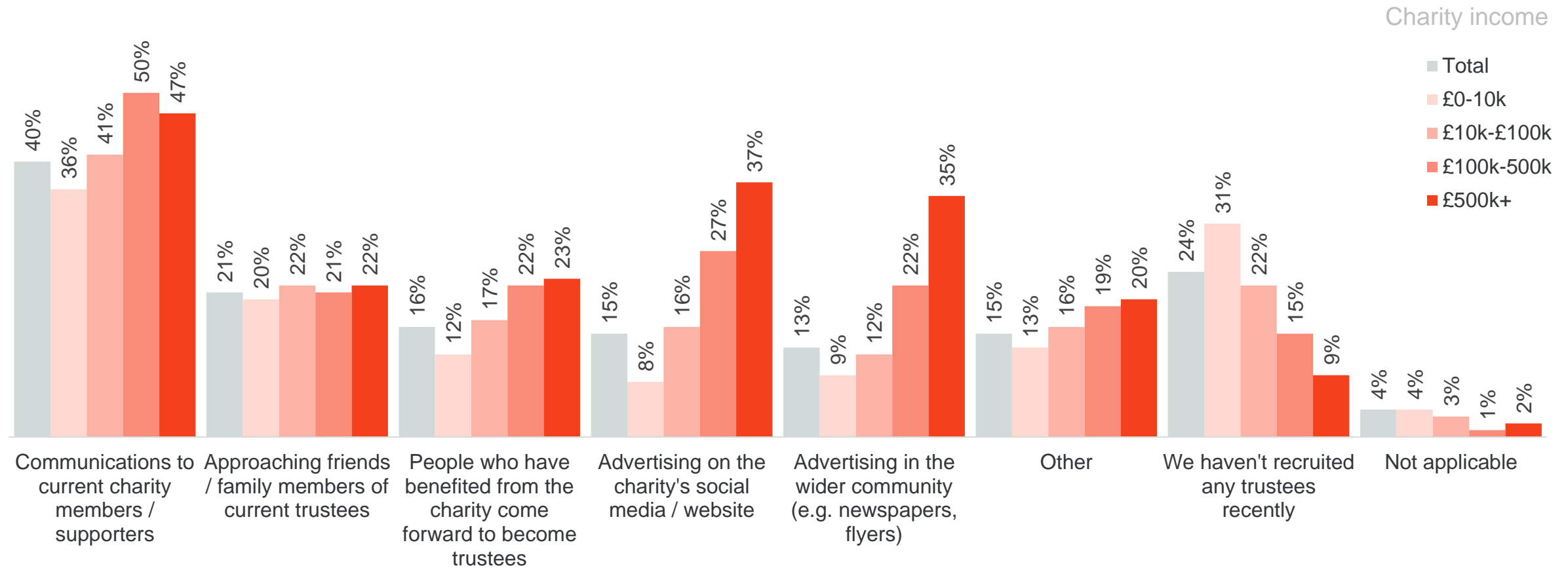


**In recruiting new trustees, charities
tend to rely on personal links.**

**Trustees are confident that their
Boards are representative of the
communities involved with their
charity**

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Smaller charities rely on their links with members and supporters or trustees' personal relationships and little else in searching for new trustees; larger charities use a broader range of channels

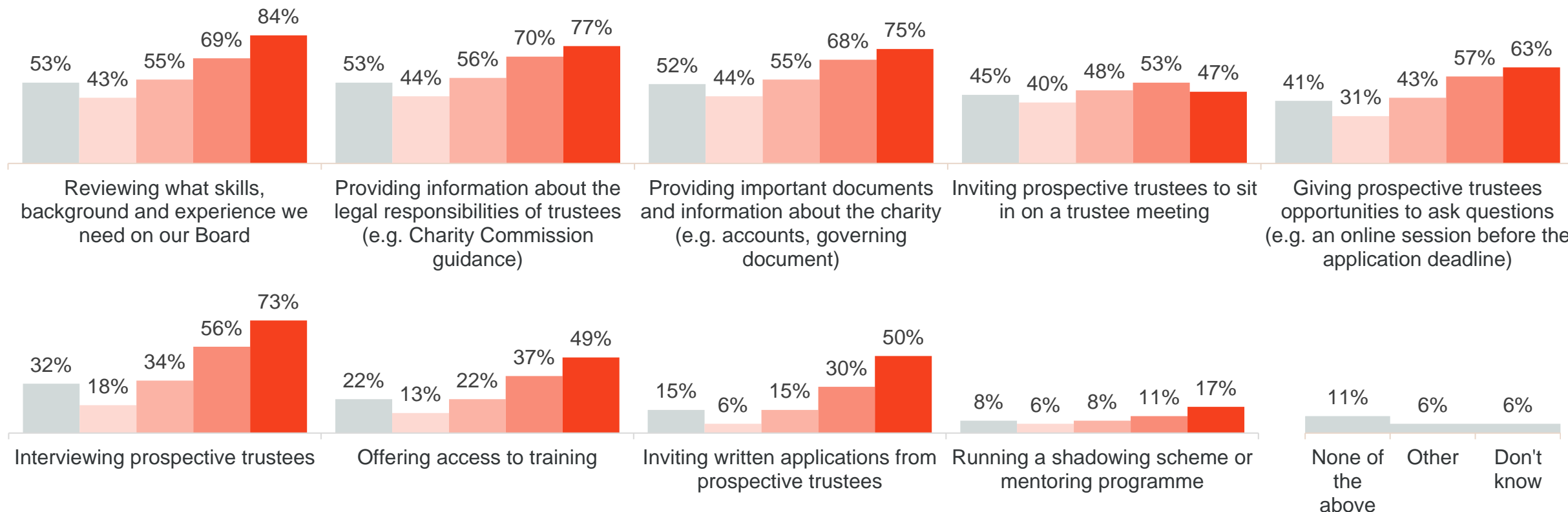


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Q. How does your charity tend to find new trustees? [select all that apply]. Base: total (3,473), £0-£10k (1,213), £10k-£100k (1,259), £100k-£500k (466), £500k (300)

Smaller charities also rely on fewer formal processes than larger charities in their trustee recruitment

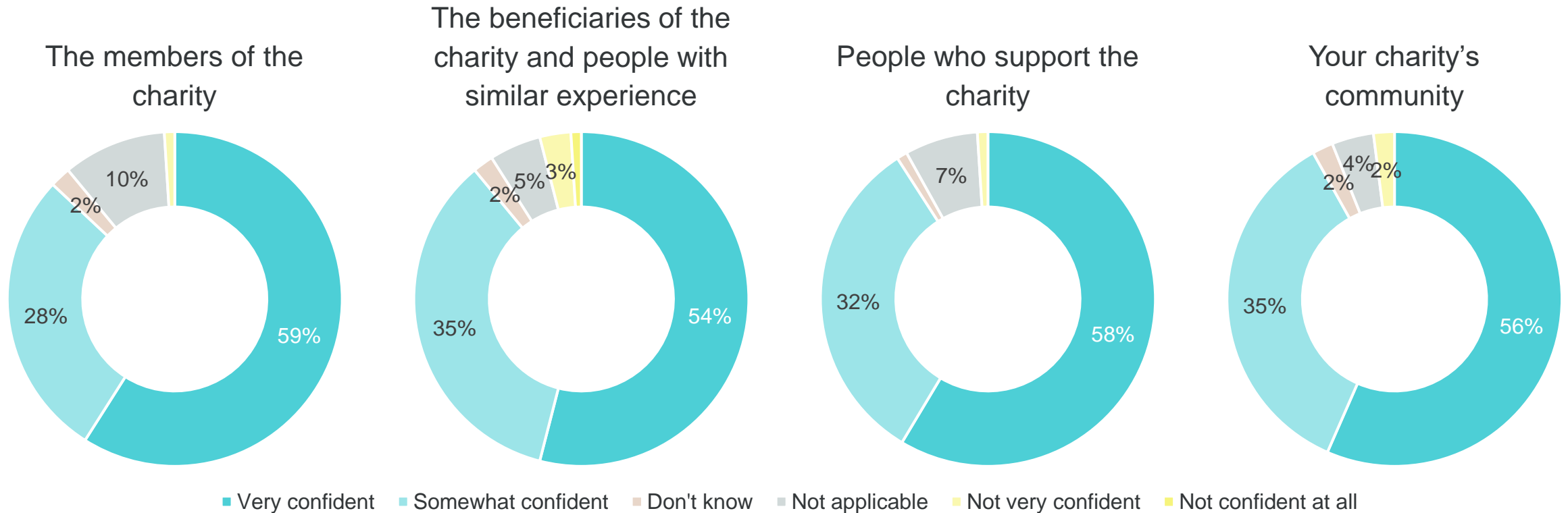
Charity income ■ Total ■ £0-10k ■ £10k-£100k ■ £100k-500k ■ £500k+



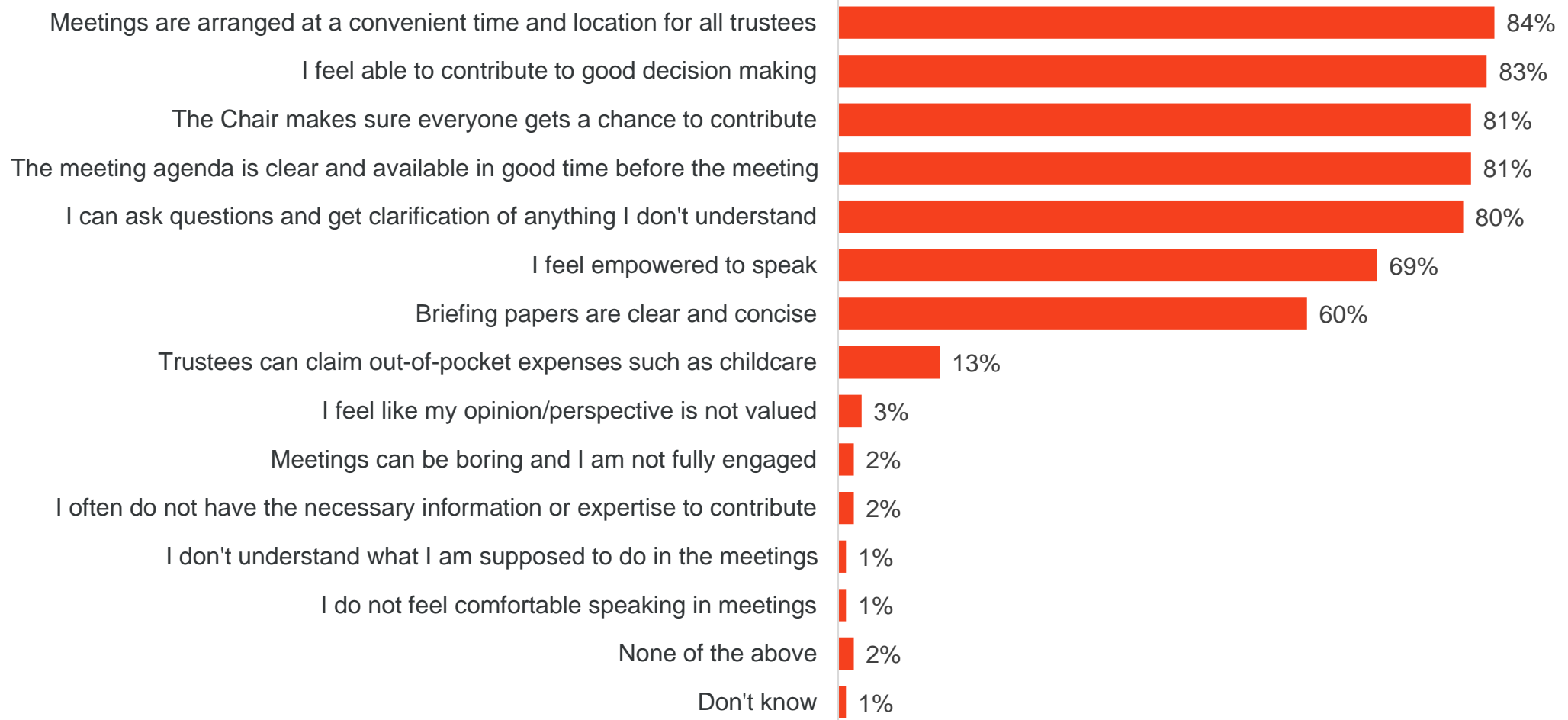
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Q. Which of the following does your charity do when you recruit new trustees? [select all that apply] Base: total (3,473), £0-£10k (1,213), £10k-£100k (1,259), £100k-£500k (466), £500k (300)

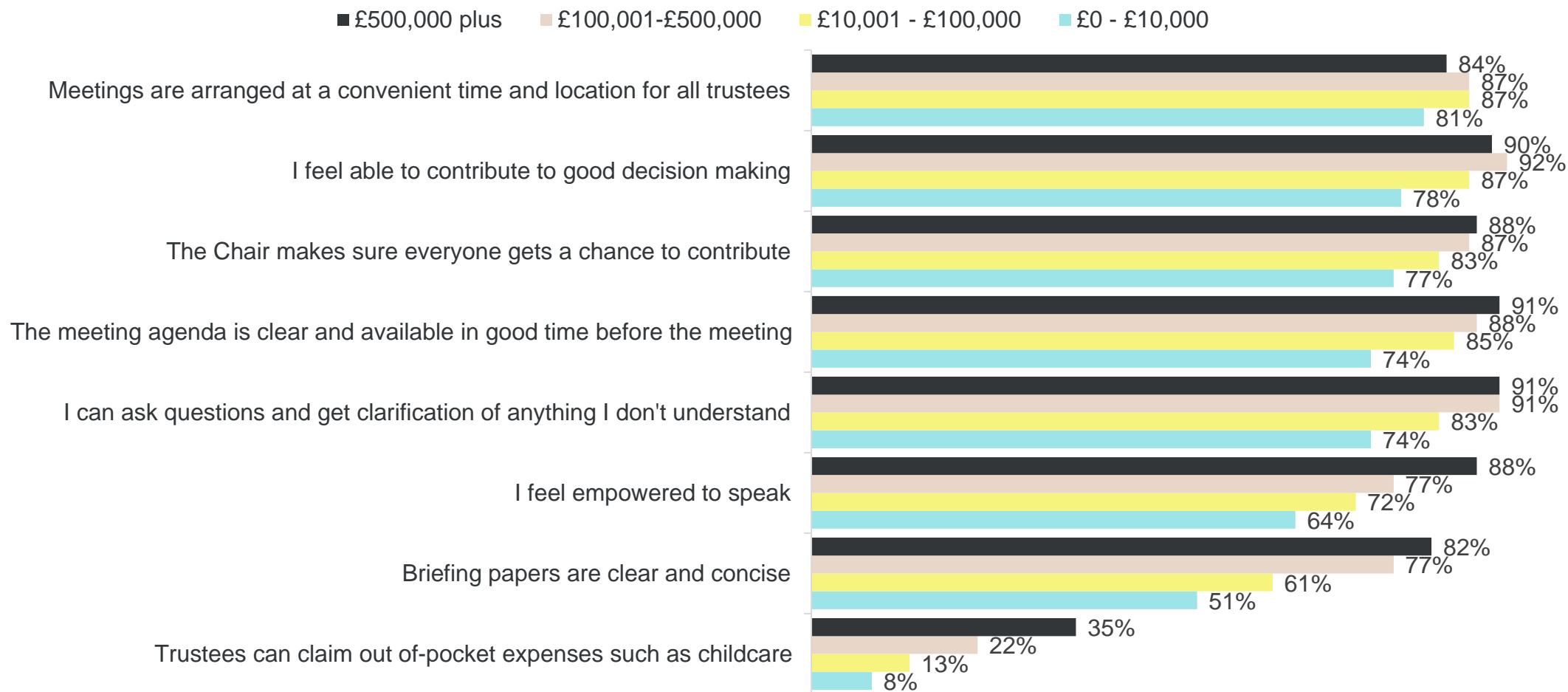
Trustees are broadly confident that their charities reflect the perspectives of all their important stakeholders



Most trustees feel that their Board meetings are well organised and run, though some do not always feel empowered to speak, and few are aware that they can claim reasonable out-of-pocket expenses



Trustees from smaller charities feel less free to contribute at board meetings and fewer of them say they have briefing papers are clear and concise



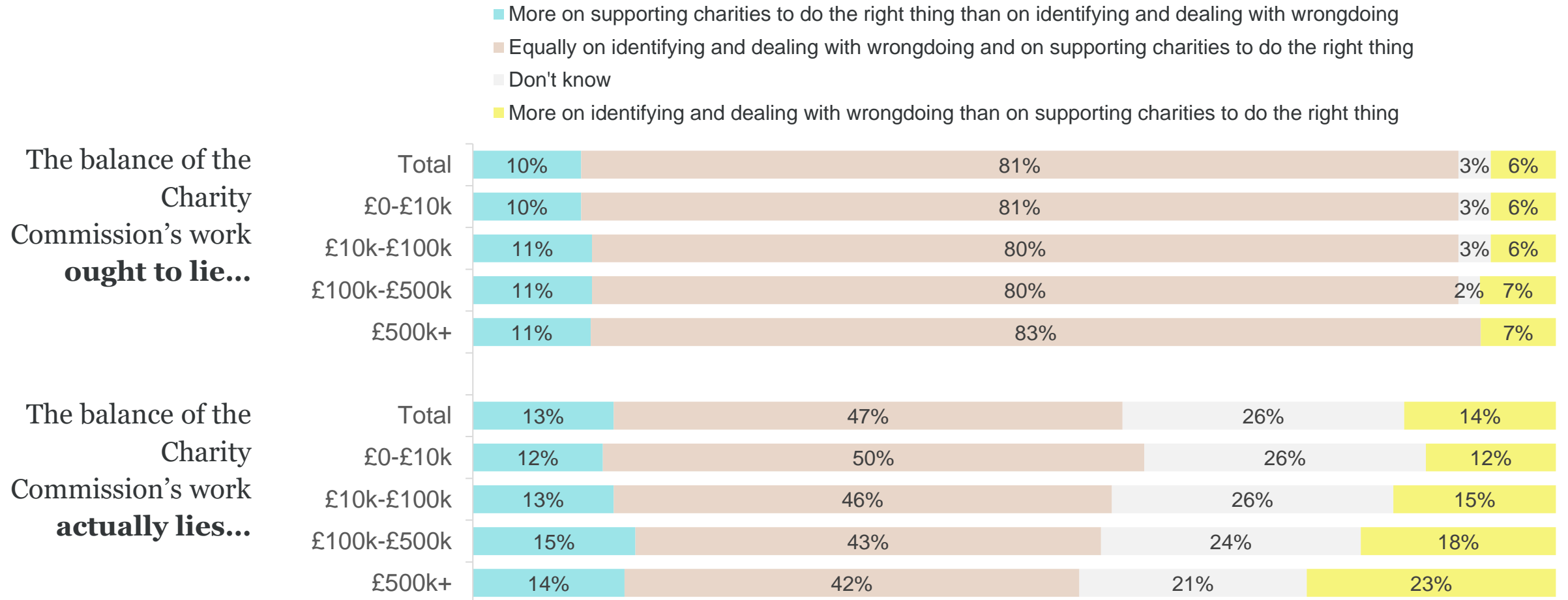
Overall, trustees tend to see the Commission as balanced between dealing with wrongdoing and helping charities act appropriately.

Those who have used the Commission's advice or permission services feel they are treated fairly.

Trustees perceive influence mainly, but not only, from charity law.

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Trustees want the Commission to find a balance between dealing with wrongdoing and helping charities act appropriately, though some are unsure where the balance actually lies



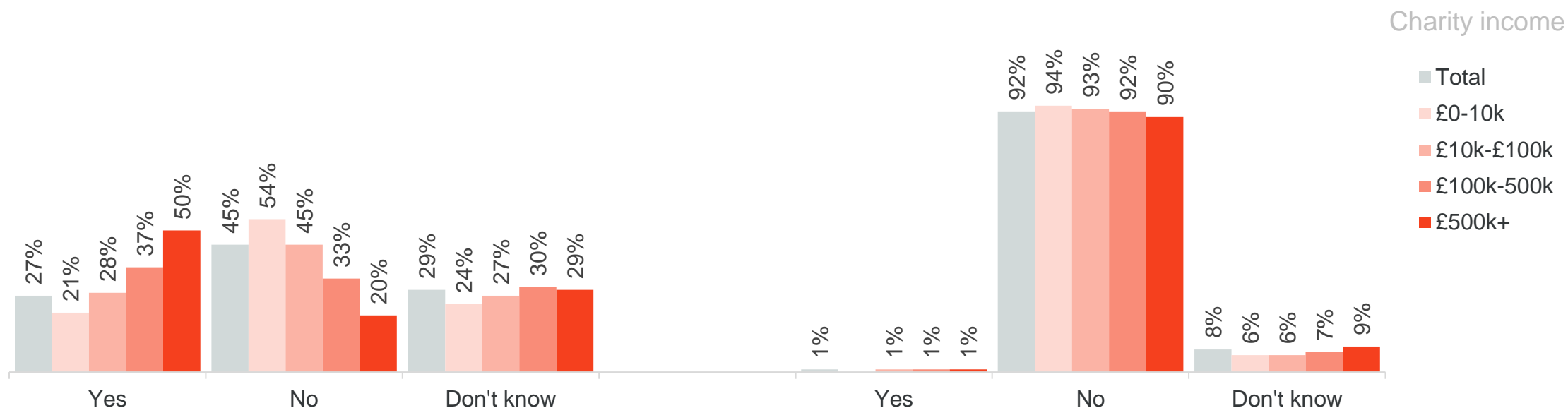
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Q. Generally speaking where do you think the balance of the Charity Commission's work ...? Base: total (3,473), £0-£10k (1,213), £10k-£100k (1,259), £100k-£500k (466), £500k (300)

About a quarter of charities have needed advice or permission from the Commission; very few have been subject to disciplinary procedures

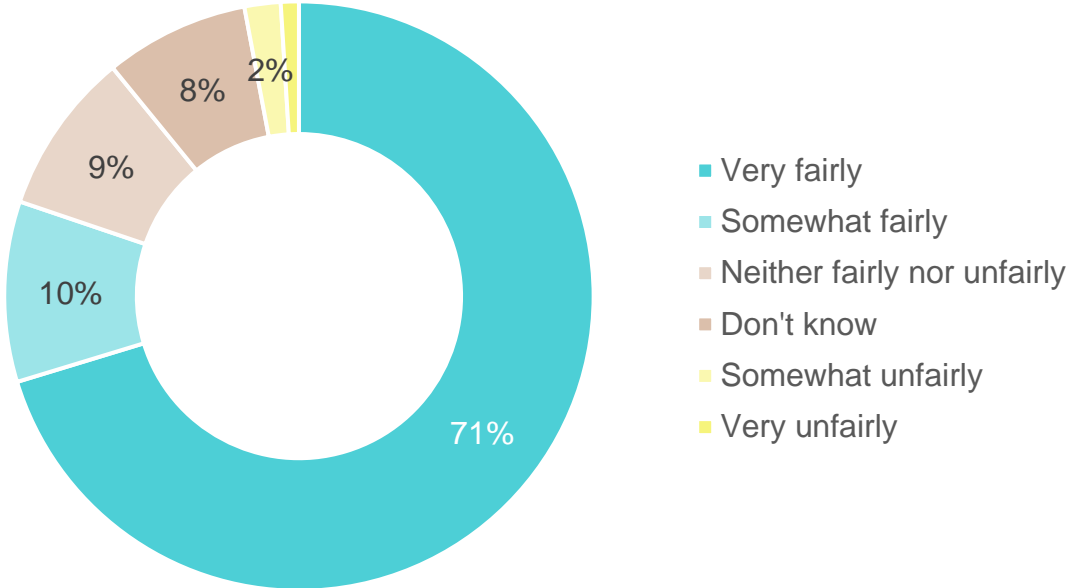
Needed to obtain advice or permission from the Charity Commission

Been subject to a Charity Commission disciplinary procedure

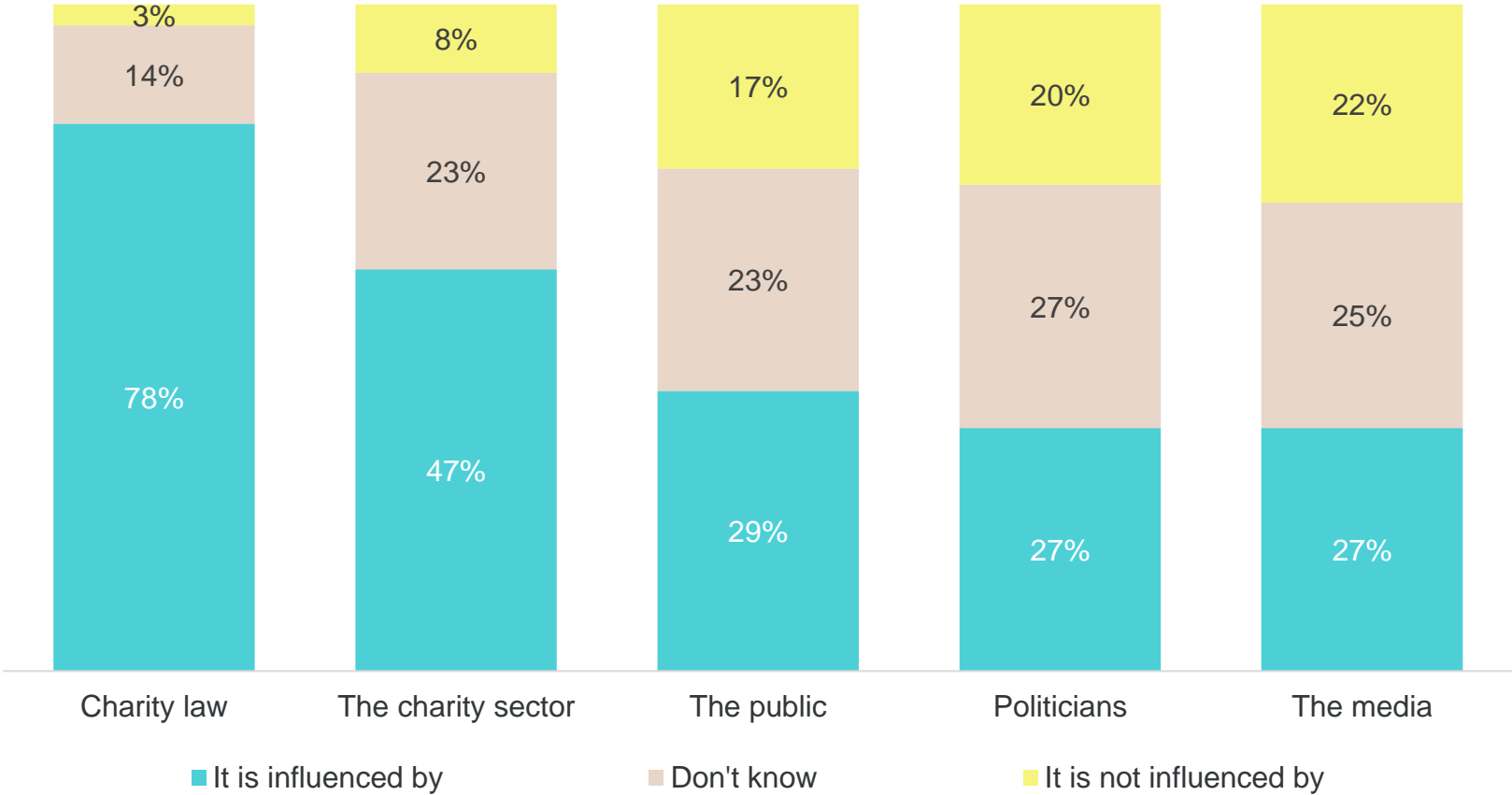


A large majority of those trustees who have needed advice or permission from the Commission consider it to be fair

Needed to obtain advice or permission from the Charity Commission



Trustees see the Charity Commission as being influenced, above all, by charity law, though also to some degree by other parts of society



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Q. To what extent do you feel the work of the Charity Commission is influenced by the following factors/groups where 1 means it isn't influenced at all and 5 means it is influenced a great? Base: All trustees (3,473)

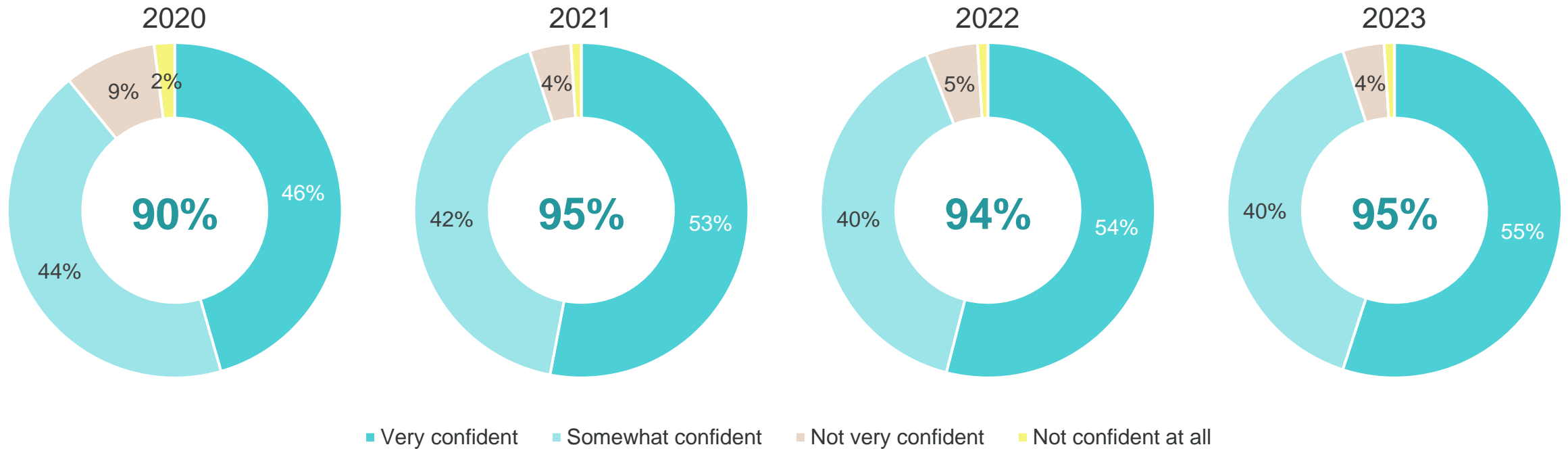
**Trustees continue to see the
Commission as better at dealing with
wrongdoing than uncovering it.**

**But trustees are more confident than
they were in 2020 that the
Commission can uncover wrongdoing**

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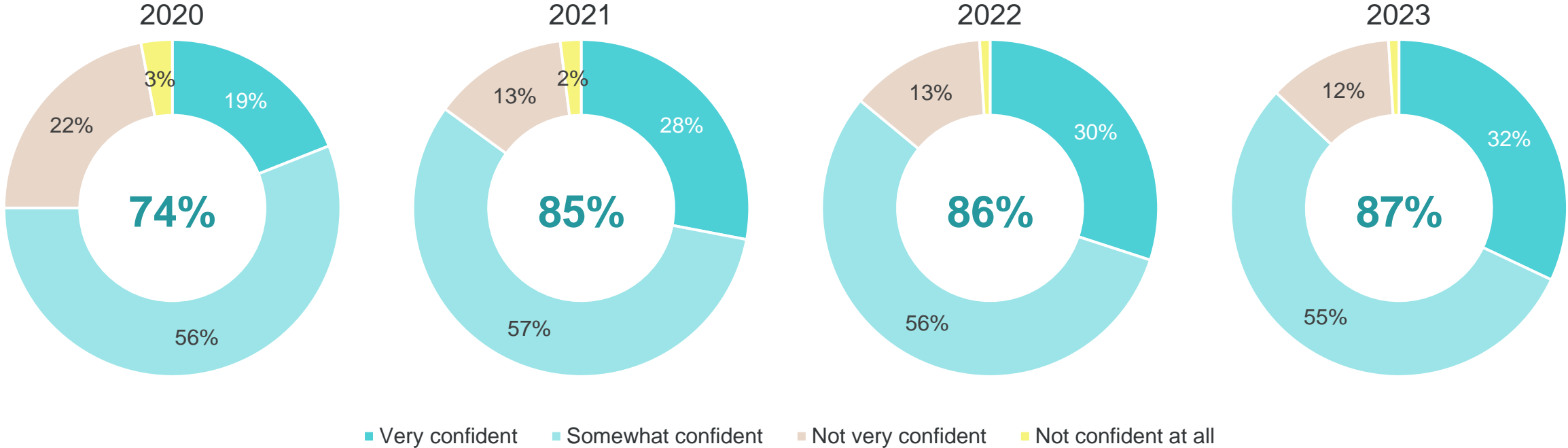
As in 2021 and 2022, the vast majority of trustees are confident that the Commission will deal appropriately with uncovered wrongdoing and harm

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



Trustees are more confident in the Commission's ability to uncover wrongdoing than they were in 2020

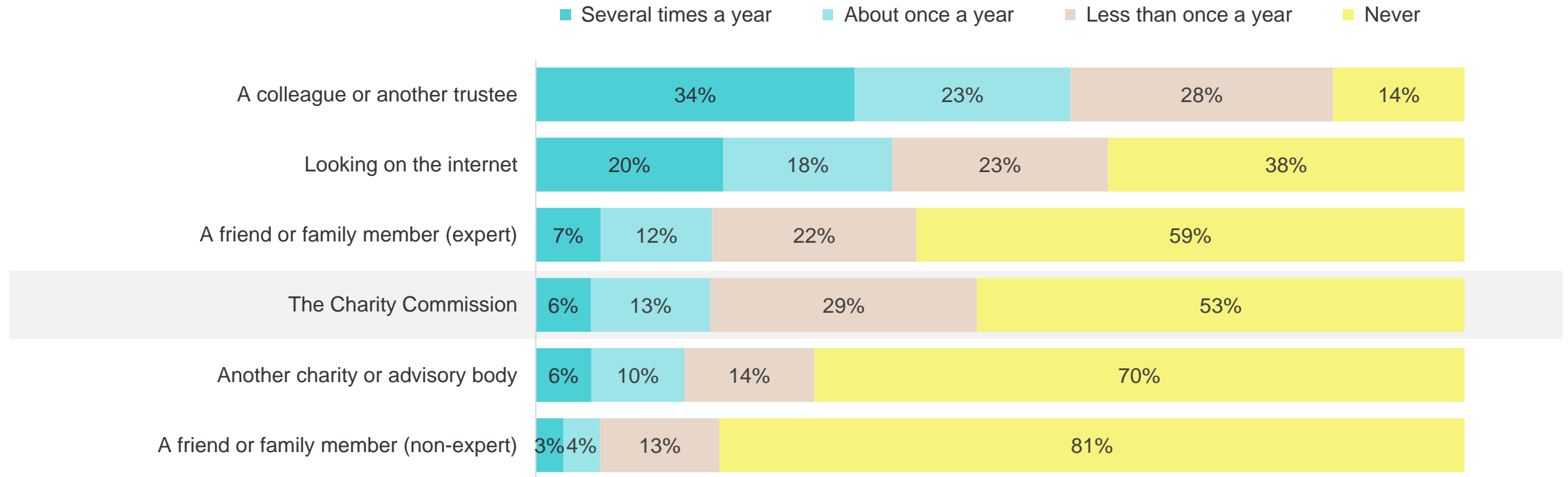
The Charity Commission's ability to uncover wrongdoing and harm when they occur in other charities



Though most trustees tend to look elsewhere for advice and guidance, those who do look to the Charity commission find it useful

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Trustees look primarily to colleagues and other trustees for advice, while half of trustees never seek help from the Commission

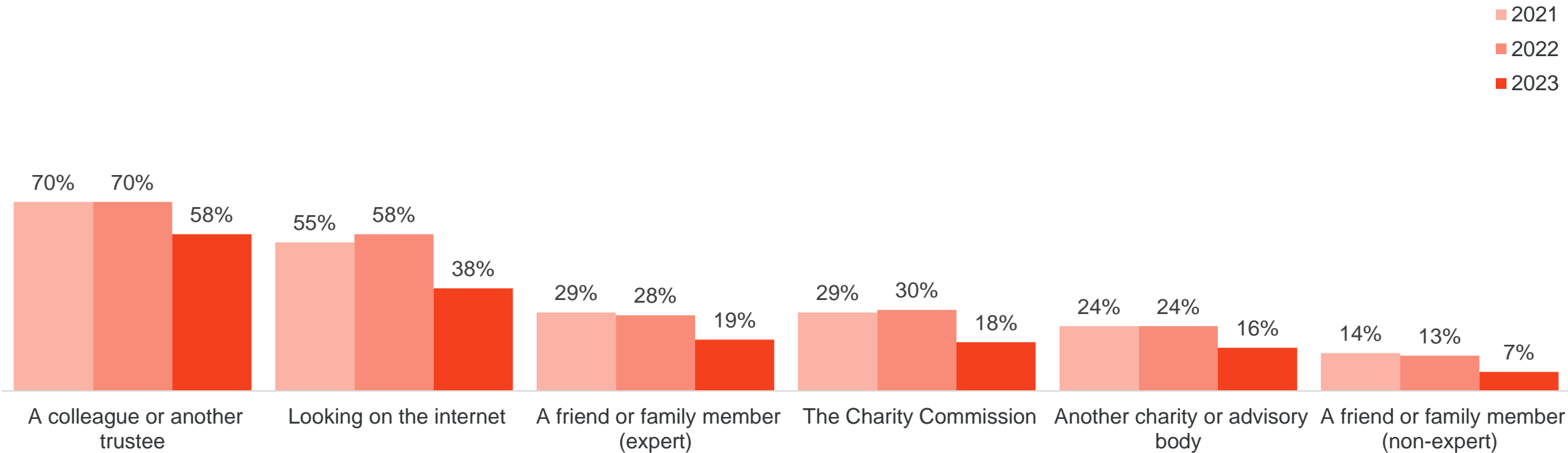


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Q. In the past, when you have been unsure about how to go about something in your role, how often have you used any of the following sources to seek help or guidance? Base (3,473)

There has been a fall this year in the proportion of trustees who look for help from not only the Charity Commission but from all sources

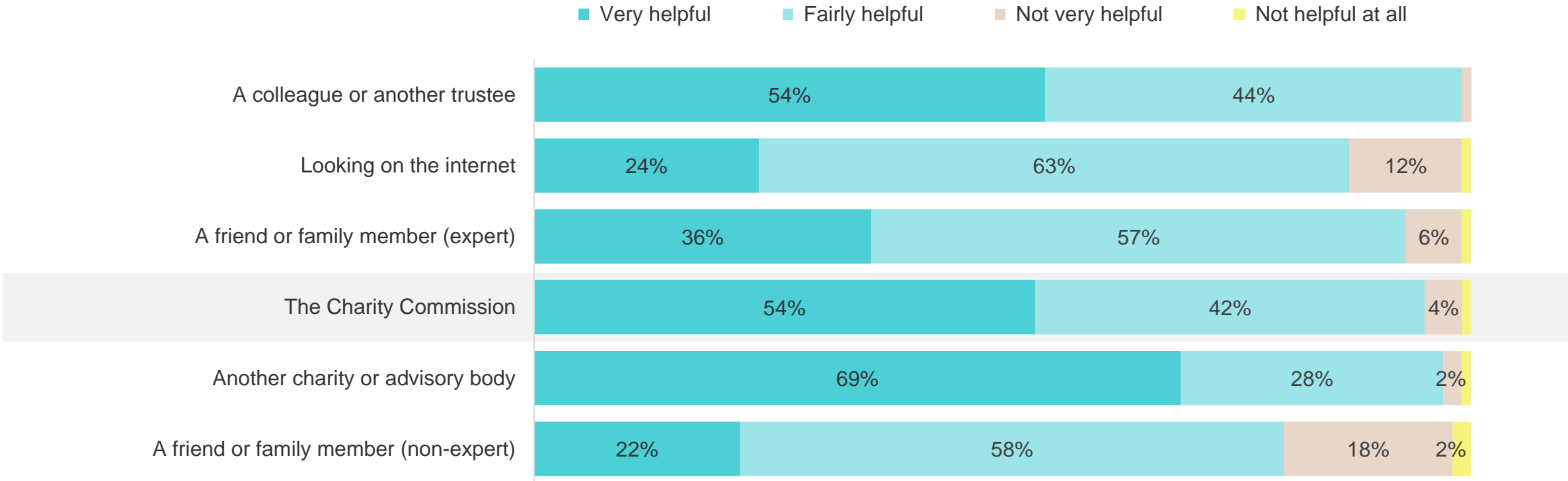
Answered 'several times a year' or 'once a year'



Trustee research - March 2023

Q. In the past, when you have been unsure about how to go about something in your role, how often have you used any of the following sources to seek help or guidance? Base: 2021 (2,713), 2022 (3,662), 2023 (3,473)

The Charity Commission’s advice is found to be helpful by almost all trustees who use it and very helpful by over half

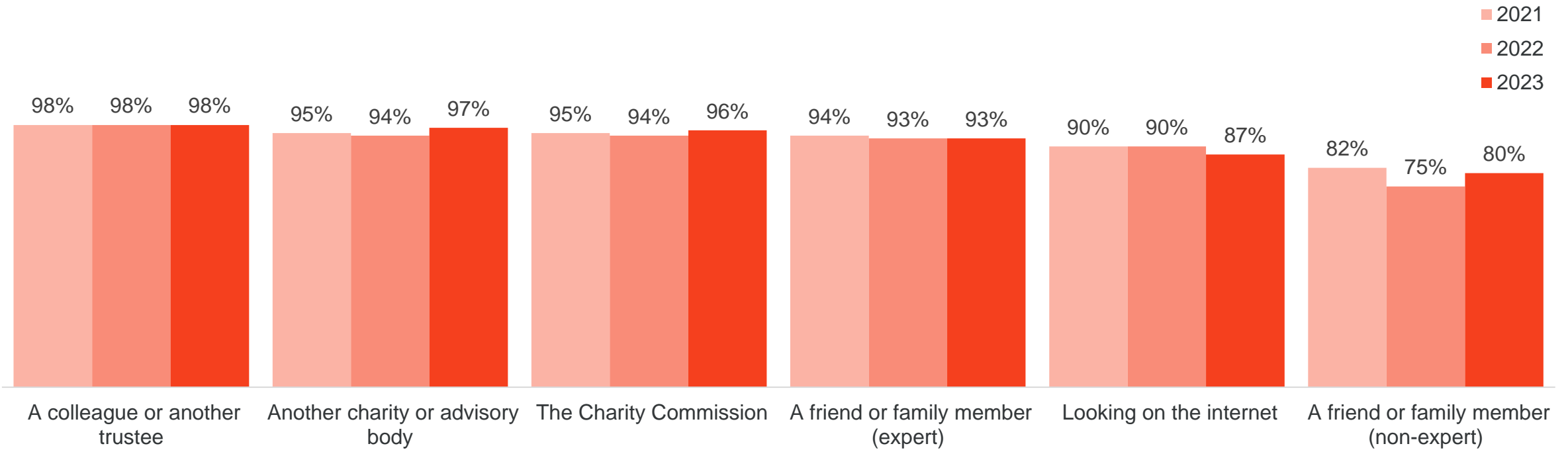


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Q. You said you had used the following sources for help or guidance. How helpful did you find them? Base: another charity or advisory body (1,094), a colleague or another trustee (3,005), The Charity Commission (1,671), a friend or family member (expert) (1,465), looking on the internet (2,190), a friend or family (non-expert) (677)

Trustees continue to view colleagues and other trustees as providing the most useful advice, though all sources are seen as useful

Answered 'very helpful' or 'fairly helpful'

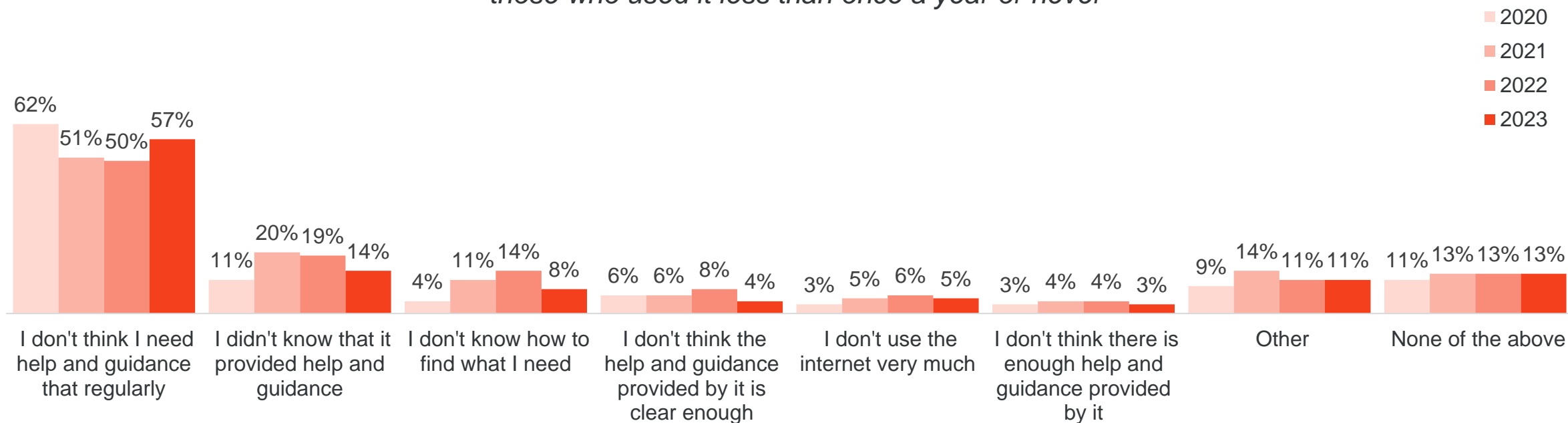


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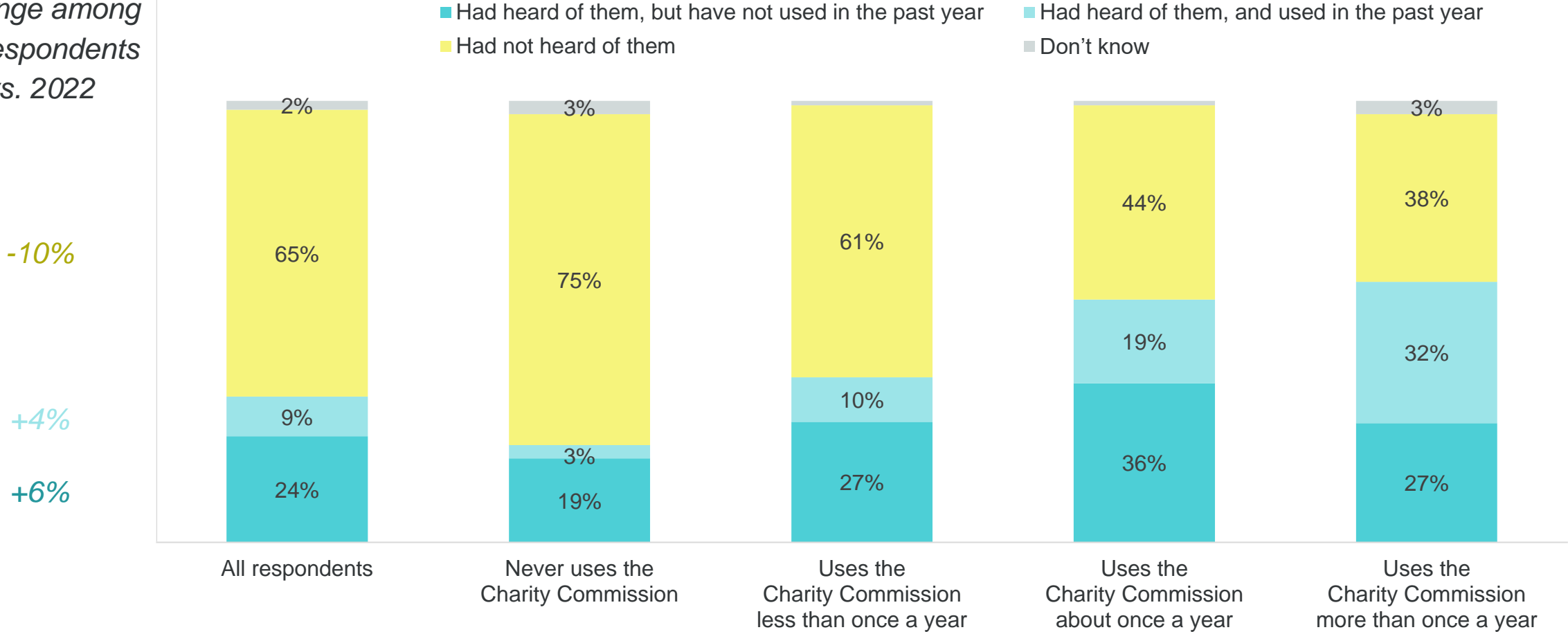
Generally, if trustees do not go to the Commission for help it is because they do not think they need any help

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



Awareness of the 5-minute guides has increased significantly since 2022. Awareness remains highest among those who regularly use the Commission

Change among all respondents vs. 2022



Those who use the Commission tend to understand trustee responsibilities better

Answered 'the board of trustees are jointly responsible'



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Q. In your charity, who do you think is ultimately responsible for each of the following? Base: All trustees (3,473), Never use the Commission (1,802), Used the Commission at least once a year (655)

Methodology

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Methodology

Quantitative survey of trustees

- + Yonder conducted an online survey of 3,473 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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