

Recruiting and Developing Trustees

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What you will learn.....

- 1. The need for trustees and a balanced board.
- 2. The consequences of different recruitment methods.
- 3. Basic trustee training and development.
- 4. Some useful contacts.

The need for Trustees / Committee Members / Directors / Board Members.

- Charity Commission requirement
- Company Law if a Limited Liability Company
- Good governance and strategic thinking
- Financial sustainability
- Future-proofing the organisation
- Meeting your charity's core aims
- Supporting the Management and Staff

Trustee Perspective

NOSE IN

HANDS OUT

Charity Experience

- 74% of Charities find it difficult to recruit trustees
- Finding a trustee to take financial responsibility is the most difficult
- Finding people to take on the role of Chair is difficult
- Finding people to take on the role of Safeguarding is a challenge
- Data and useful information: <https://www.gettingonboard.org/signup-howto-recruit-trustees-guide>

Trustee Experience

- 96% learn new skills
- 86% it complements professional, community and family life
- 84% felt that 'doing good' in this way made them happier
- 73% felt the experience boosted their confidence
- 38% developed new leadership aspirations as a consequence
- 22% achieved promotion as a result of being a trustee

Missing from Charity Boards

- **Young people**
 - **Average age of Trustees is 57**
 - **> 0.5% trustees are 18 – 24**
 - **2/3rds of charity trustees are over 50**

Women: 2/3rds of trustees are men
80% of chairs are men

BAME backgrounds: 6% of trustees generally but often clustered in specific charities

Disabled, LGBT and other minorities: > 1% in general
low often in specific charities

Consequences

- 86% of charities are not equipped to meet compliance, strategic and development needs for the next 3 years.
- Is your charity equipped for the future?

Current Challenges

- Post-covid: restructuring, technology, funding
- Post-Brexit: changes to funding through public authorities
- Low Economy: low interest rates restrict grant giver funds
- Competition: more charities applying for funds
- Equality, Diversity and Inclusion: EDI – in funding applications and tenders, Charity Commission reporting and legal reporting you will need to prove how EDI is embedded in your culture, policies and practices. <https://www.charitygovernancecode.org/en/6-diversity>
- Welsh Language <https://wcva.cymru/welsh-language-standards/>

Fundamental skills within a board

- Compliance, governance and ethics
- Financial oversight
- ‘Business’ Strategy, Risk Management + Safeguarding
- Balance of client needs with charity provision
- Equality, Diversity and Inclusion <https://wcva.cymru/resources-to-support-trustees-with-equality-diversity-and-inclusion/>

Specific skills within the board

- Running a business
 - Managing finance / people / resources / property
 - Understanding of client needs
 - Understanding of the environment in which the charity is operating
 - Funding, bidding and tendering and/or fundraising
 - Technology for internal /external use
 - Reaching different stakeholders and communications
 - Knowledge of specific geographical areas or communities
 - Welsh speaking or other language skills
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- **What skills / experience are missing from your own Charity Board?**

Consequences of imbalance

- Non-compliance
- Inability to be sustainable
- Not reflecting the communities you serve / hard to reach potential clients
- Too much emphasis on one aspect of the 'business'
- Not enough 'business' oversight / Poor decision making.
- Not meeting clients' needs
- Impact on reputation

- Further list what is applicable to your charity

Recruitment Process

1. What skills do you need?
2. What EDI gaps do you need to fill?
3. Is your recruitment pack complete and process clear?
4. What is your advertising and promotion mix: recruitment agency, newspapers, social media, word-of-mouth, trustee recruitment platform, local platforms, third party promotion.
5. Who are responsible for the various stages and how is it coordinated?

Recruitment Practice

1. How is interest converted to an application?
2. Shortlisting and interviewing: how, who, when.
3. References
4. Getting new trustees on-board: legal and practical
5. Induction process

Trustee recruitment

- Word of mouth
- Local advertising
- Posters
- Website and digital media
- Online 'marriage' agencies
- Contacting specific organisations e.g accountancy, legal, personnel
- Using a recruitment agency

- What combination is appropriate for your charity?

Resources for Recruiting Trustees

- Some Trustee listings websites
- Volunteering Wales: <https://volunteeringwales.net/vk/volunteers/index.htm>
- Reach: <https://reachvolunteering.org.uk/im-an-organisation> (free)
- Charity Job Finder: <https://charityjobfinder.co.uk/en/trustee-roles/> (free)
- Small Charities Coalition: <https://www.smallcharities.org.uk/> (free)
- Women on Boards: <https://www.womenonboards.net/en-gb/home>
- Recruit3 (paid) : <https://www.recruit3.org.uk/jobs/>

Trustees with Specific Skills

- Local Large Business
- Local Networks, Business Organisations,
 - Chambers of Trade, Chambers of Commerce, Rotary, Soroptomists
- Professional Associations
 - Accountants: <https://www.icaew.com/technical/volunteering-community/volunteering>
 - Treasurers: <https://www.honorarytreasurers.org.uk/>
 - Lawyers: <https://www.barcouncil.org.uk/policy-representation/policy-issues/pro-bono.html>
 - HR: <https://peoplemanagement.haymarketrecruitment.com/about-us/>
 - Publications, websites, online networks.

Skills Audit tools

- Reachskills.org.uk

<https://reachvolunteering.org.uk/>

Knowledge centre/support-boards/recruitment-and-retaining-trustee/how-do-i-do-skills-audit

- Prospect-us.co.uk

<https://www.prospect-us.co.uk/>

media/84991/board-skills-audit-v1.doc

- Gettingonboard.org

<https://www.gettingonboard.org/trustee-recruitment-pathways> Useful-documents-for-charities

- Charity Commission website is a mine of good information

<https://www.gov.uk/government/organisations/charity-commission>

- Local CVCs (PAVS, CAVO, CAVS) have skills audit tools.

Developing trustees

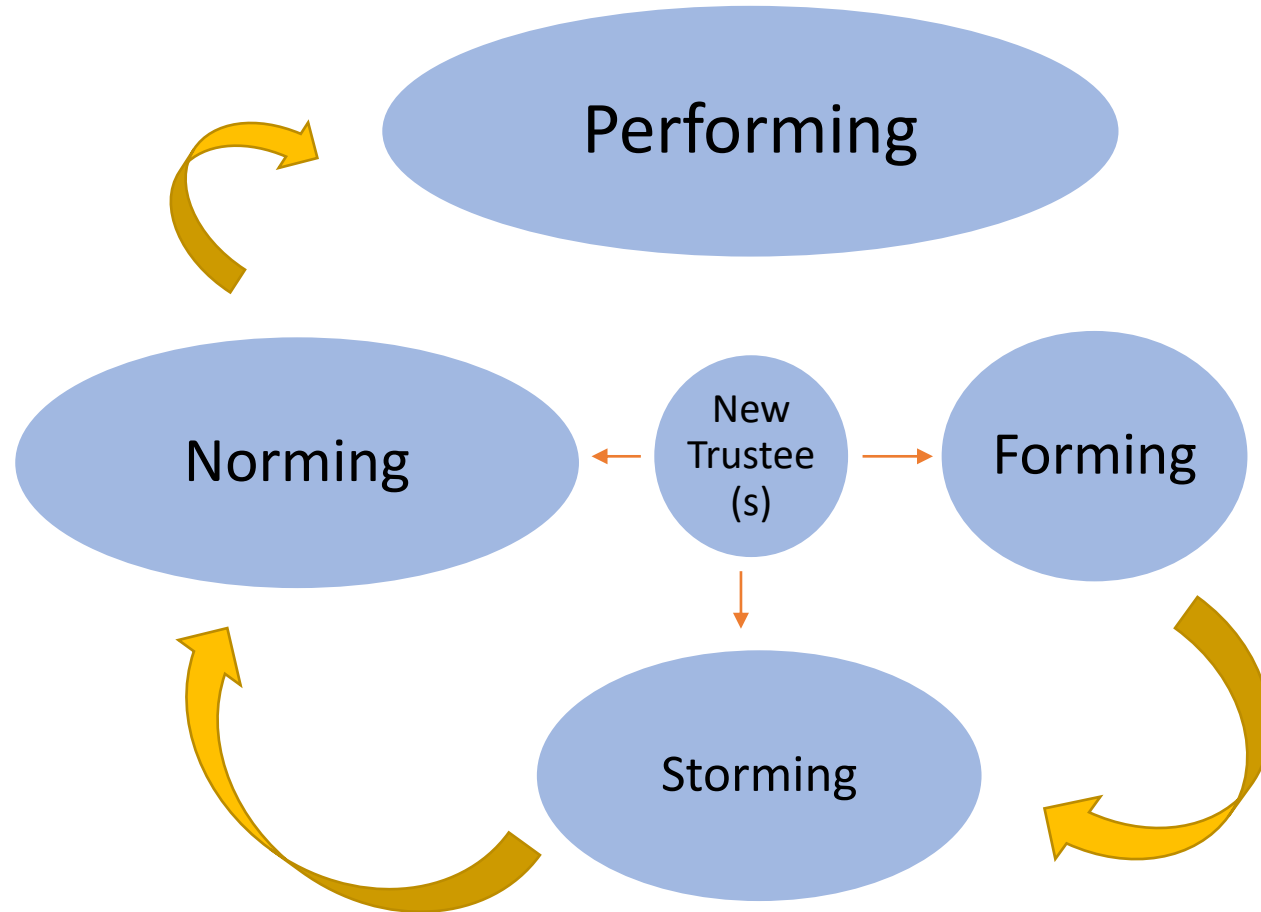
- A clear and concise induction programme
- Charity Commission website <https://www.gov.uk/government/organisations/charity-commission>
 - Trustee roles
 - 15 questions trustees should ask <https://www.gov.uk/government/publications/charity-trustee-meetings-15-questions-you-should-ask/charity-trustee-meetings-15-questions-you-should-ask>
 - Understanding charity finance
- Away-Days
- Training courses
 - County Voluntary Councils / WCVO / Civil Society / Good Governance
 - Bespoke training – PAVS / CAVO / CAVS

Induction Programme

Induction is a journey not an event

- Who is responsible for what throughout the induction process?
- **Confidentiality and security**
- Introductions and contacts: board, management, staff, volunteers
- Technical access, procedure, passwords, security
- Understanding the key aims and objectives of the Charity and how we achieve them.
- Organisational Architecture and Communications Routes: Board and sub-groups, management structure, staff and volunteers structures / groupings
- Organisational Calendar: meeting dates, key deadlines, events
- Places to visit, people to meet, key stakeholders, partners
- Mentoring

Developing the board



Disparate group of Trustees or a Performing Board?

- Time and Space
- Getting to know each other: personal and professional
- Work / Business / Charity experience
- Direct skills
- Transferable skills
- Strengths and Weaknesses
- Learning together
- Trust and Respect

Charity Commission (England and Wales)

- **There** are just over 169,000 **charities** operating in **England** and Wales as of January **2021**, an increase on the previous year of around 1,750. 8 Jan 2021
- There are around 700,000 trustees
- It is estimated that this involves up to 500,000 people
- **KEEP UP THE WEST WALES COMMITMENT**