

HOW TO DIVERSIFY YOUR CHARITY'S BOARD

A PRACTICAL GUIDE



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FOREWORD



Charity Commission for England and Wales

Trustees are essential in ensuring that charities are delivering on their purpose and taking ultimate responsibility for what happens within a charity. The Commission is grateful to all trustees that contribute to the important work of boards across England and Wales.

Having a diverse group of people on boards, in terms of background and experience, but also in outlook and personality, supports the effective governance of charities. That's because having different perspectives, skills and experiences helps charities to anticipate and challenge risks, effectively consider new opportunities, and tackle the difficult but necessary decisions. Conversely, boards that don't have the right mix of skills, experience, and perspectives to test and challenge decisions or ideas are more at risk of 'groupthink'.

Working with partners such as Getting on Board has been vital in allowing us to understand the opportunities to increase the diversity of trustees, as well as the barriers that may exist.

The Commission recognises the ongoing need to encourage different perspectives on charity boards, with a focus on diversity in all its forms and encouraging people from a greater range of backgrounds to consider being a trustee.

We continue to hold this commitment and encourage boards to consider how they can attract and welcome a diverse group of trustees to their organisation.

Holly Riley

Head of Strategic Policy,
Charity Commission for England and Wales

FOREWORD



Shaparency

The critical role a well-functioning board plays in an organisation's success cannot be overstated. In nature, diversity is important for the ecosystem to function well. Diversity is equally important in business, both for profit and not for profit. Several studies from McKinsey, Deloitte and BCG show correlations between diversity on the board and an organisation's performance.

The more diverse the board, the more likely it will be that perspectives are not only represented, but heard. The board will be more prepared for risk and change, as well as making better decisions. This diversity goes beyond gender, and must include skill, age, race, culture, religion and abilities.

This guide comes at a crucial time for charitable organisations as we navigate through the cost of living crisis and the other significant challenges and opportunities that our changing times present. Now is the time to lead with purpose. To achieve this, it's essential that we have strong, functioning, diverse and inclusive boards at the helm of our organisations. I see this guide as an outline of the actions that are incumbent upon us all to take.

Ben Nowlan
CEO, Shaparency

FOREWORD



A note from the author

When I was invited to write this guide, I was thrilled and filled with gratitude. Whether fighting homelessness or preserving nature, charities exist for the public benefit – and often lead the way in addressing the most pressing issues of our time. It's important that our boards are reflective of the communities we serve and inhabit.

Diversity, or lack thereof, is at crisis levels in the third sector, and this under-representation is to the detriment of our organisations, as well as those we exist to support. It doesn't have to be this way and I hope the guide helps provide a few solutions.

I've enjoyed working as a team across the sector to produce the guide, particularly tapping into the thoughts of some of the leading voices on board diversity and inclusion. The Getting on Board team have been working to diversify charity leadership for years, giving small organisations and large charitable institutions alike the tools to diversify their boards. I'm honoured to be part of that journey.

This guide matters because diversifying our leadership isn't an aspiration beyond reality – there are practical, immediate and longer-term steps we can take to create more representative and inclusive boards. As a trustee myself, I know first-hand how much value is unlocked when boards can welcome in new talent without barriers, and develop inclusive, safe environments for them to thrive in.

Sophia Moreau

Multi-award-winning Diversity, Equity and Inclusion Specialist, Campaigner, Trainer and Charity Trustee

Thank you to the supporters of this guide.



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Thank you also to the 12 recruiters who sponsored this guide, and formed their own advisory group.

INTRODUCTION

At Getting on Board, we envision a thriving charity sector that is equipped by its diverse boards to meet current and future challenges.

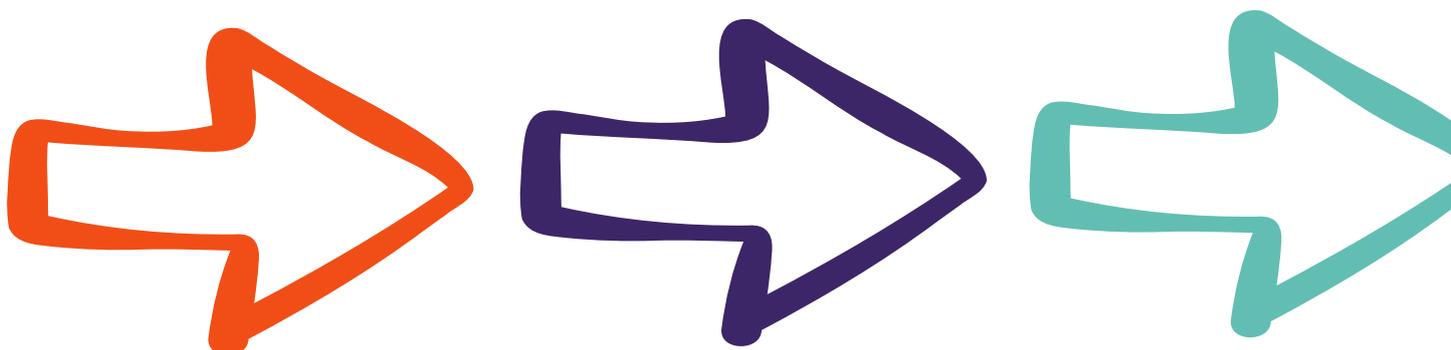
Our mission is to change the face of trusteeship, by opening it up to all sectors of society, particularly those who are currently under-represented on charity boards.

This guide is based on Getting on Board's work with hundreds of charities to support them to diversify their boards. The aims of this guide are to:

- ▶ Provide charities with the guidance and tools to diversify their boards for the first time, or to maintain and improve the diversity of their board.
- ▶ Support organisations to recruit trustees who will be transformative to the charity concerned.
- ▶ Ensure that new trustees are treated inclusively and equipped to contribute fully to the charity which appoints them.
- ▶ Strengthen the UK charity sector by giving charities the tools to grow and diversify the trustee pipeline.

We are grateful to our funders and to the members of the advisory groups of this guide, who collaborated to contribute their expertise. Thank you to IVAR and focus group participants who shared valuable insights about being in a minority on a board. Thank you to Russell-Cooke who checked some of the legal text in this guide.

This guide is supplemented by templates and examples on our website. Follow the link where you see the  symbol. Any templates we provide are a helpful guide, but they are for you to adapt to your context.



The guide is primarily written for organisations based in England and Wales, although the principles of inclusive recruitment and onboarding apply wherever you are based. You should always check your regulators' guidance, and the rules set out in your organisation's governing document.

The quotes that you'll see scattered throughout the guide are real. They come from Getting on Board's research, focus groups and surveys from the past two years. They are anonymous and they haven't been edited, however stark some of them appear. We are particularly grateful to those people who shared their experiences and reflections with us. We think that listening to trustees from under-represented groups is a central part of how we are going to improve diversity and inclusion on charity boards.

The photographs in this guide are from real charities. As well as photos of trustees, we chose photos of the work of charities. What charities do at the frontline is, after all, why trustee diversity matters. When looking at these photographs, we remind you of two things. Firstly, that not all diversity is visible. And secondly, that charities still have a long way to go in terms of the diversity of their boards, staff and service users. On that note, we invite you to read on.



“What charities do at the frontline is, after all, why trustee diversity matters.”



SECTION 1

AN INTRODUCTION TO TRUSTEE DIVERSITY AND INCLUSION

WHAT DO WE MEAN BY TRUSTEE DIVERSITY?

Diversity is a tricky word. The Merriam-Webster dictionary defines diversity as ‘the condition of having or being composed of many elements’.

This is correct in the context of trustee diversity, though trustee diversity isn't so easily summarised in a single sentence. Trustee diversity is defined by board members who are different from each other. However, it doesn't mean that diversity equals inclusion or even integration. We'll come to those terms later. If in doubt, it helps to remember that diversity is a fact, not an act(ion) – it's the variety and representation of members on a board.

Remember that people are often a mixture of different characteristics and life experiences, so try not to assume what a person's ‘primary characteristic’ might be.

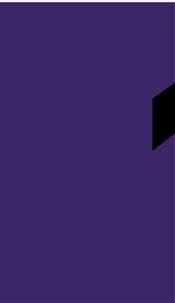


The board of the Literacy Pirates

The trustee recruitment landscape

A teal rectangular background with the text '75%' in large, bold, black font.

of charities struggle to recruit trustees.

A purple rectangular background with the text '10%' in large, bold, black font.

of trustee vacancies are advertised.

A yellow rectangular background with the text '90%' in large, bold, black font.

of charities report that they recruited most of their current trustees through word of mouth and existing networks.

Closed trustee recruitment is a key culprit for the lack of diversity in who serves as a trustee. We know and are surrounded by people like ourselves – whether that's with regards to our professional field, education, attitudes, ways of working, where we reside in the country or our economic class. When our pool of talent is our own circle, we are limited and likely to recruit in our own image.

An orange rectangular background with the text '14%' in large, bold, black font.

Only 14% of boards feel well equipped to meet the strategic, development and regulatory challenges of the organisation, given who is on their board¹.
Whatever we are currently doing in terms of trustee recruitment, it isn't working.

1. [The looming crisis in charity trustee recruitment](#), Getting on Board, 2017.

Statistics on the diversity of trustees

Gender

36%
 of trustees are women.

Race

8%
 of trustees are from ethnic minorities, despite comprising 14% of the population.

Age

1/3

of trustees are under 50; 0.5% of trustees are under the age of 25, many of whom are believed to be in youth - or education-focused charities – suggesting the figure for under 25s in mainstream charities is far lower.

Class

25%



of trustees are from households below the national median for household income; 60% of trustees have a professional qualification².

Service user representation

59%

of charities say their boards do not reflect the communities they serve³.

Further gaps

ZERO

there are no national statistics on board members with characteristics such as disability, sexuality or caring responsibilities.

² These statistics are taken from the Taken on Trust report commissioned by the Charity Commission for England and Wales in 2017. There are no national statistics for trustee diversity in Scotland or Northern Ireland.

³ The looming crisis in charity trustee recruitment. Getting on Board, 2017.



Education and Employers

When we require or assume prior trustee experience when recruiting trustees, we are recruiting from a narrow pool of society and perpetuating under-representation.

"CHARITIES SOMETIMES RECRUIT TRUSTEES FOR PRESTIGE RATHER THAN DIVERSITY OF THOUGHT."

"[TRUSTEE RECRUITMENT IS A] VERY SMALL GROUP OF PEOPLE LOOKING FOR A VERY SMALL GROUP OF PEOPLE WHO LOOK AND THINK JUST LIKE THEM."

"[TRUSTEE DIVERSITY IS] NOT JUST ABOUT FAIRNESS AND EQUALITY BUT OUTCOMES THAT WILL IMPROVE PEOPLE'S LIVES AND YOUR RESULTS."

What does trustee diversity cover?

Trustee diversity covers the following aspects:

Protected characteristics

The Equality Act became law in 2010. It covers everyone in Britain and protects people from discrimination, harassment and victimisation. Everyone in Britain is protected. The Equality Act protects people against discrimination because of the protected characteristics that we all have. It is against the law to discriminate against someone because of:

- ♥ age
- ♥ race
- ♥ sex
- ♥ gender reassignment
- ♥ disability
- ♥ marriage or civil partnership
- ♥ religion or belief
- ♥ sexual orientation
- ♥ pregnancy or maternity

Lived experience

Technically, everyone has 'lived experience' because we are all living. However, when we speak of lived experience, we are specifically addressing lived experience of either structural disadvantage or a particular cause. For example, lived experience of poverty or housing insecurity would be of relevance to the board of a housing charity.





The Winch

Class

Socio-economic class is our economic identity. This can overlap or intersect with some of the other areas of diversity on this list, such as protected characteristics or geographic location. Class isn't straightforward, due to the subjectivity that comes into it, the mobility some will experience during the course of their lives and the role of self-identification.

Neurodiversity

Neurodiversity covers conditions such as autism, attention deficit hyperactivity disorder (ADHD) and dyslexia, among others. While these conditions might be considered under disability, particularly depending on how they impact an individual's life and access to society, they will also impact diversity in ways of thinking. This can alter how a person problem-solves and considers different issues, and even the risks they spot.

Geography

Geographic diversity covers representation from different areas. Trustee diversity in a local charity could cover representation from different parts of the city, borough or neighbourhood. Areas with a greater density of lower-income households might be less well represented on a board. Another example of lack of geographic diversity may be a national charity primarily or exclusively having trustees from London.

Skills, knowledge, networks and experience

This covers a relevant mixture of soft skills, ways of working, knowledge, professional backgrounds, experience (including lived experience) and networks. It may surprise you to see this on this list, but we can't emphasise enough that every new trustee you appoint must have skills, knowledge, networks or experience (including lived experience) that are useful to your organisation. Diversity never replaces skills, knowledge, networks and experience – it augments it.

TRUSTEE TRUTHS



What percentage of charity trustees are disabled? Does anyone know?

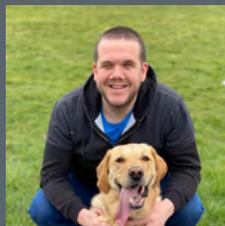
It's telling that there are no statistics available about the number of disabled trustees in the UK, yet disabled people make up over 20% of the population. All too often, disabled people are forgotten about, and that's why it's important to have us on your boards.

'Why' you may ask, 'are there so few disabled trustees?' In my experience, accessibility is a big barrier. Application processes not being accessible; interviews not offering adjustments; meeting locations in non-accessible buildings; board papers not in accessible formats; the cost of extra support; the lack of understanding that it's barriers that disabled people have, not impairments; and the attitude of, 'My dad's disabled, I know what it's like'. These are all reasons it's hard to recruit disabled people as trustees.

Bringing disabled people onto boards as trustees isn't just important, it's imperative. Charities should seek out disabled people as trustees, just as they do accountants or marketing people. Disabled people are one of the biggest protected characteristic groups in the UK and it's almost guaranteed that they'll make up over 20% of a charity's beneficiary group. Why wouldn't you seek out that skill set?

Disability representation isn't just something for disability charities to consider – it's something to consider for any charity that thinks inclusion is important.

Disability inclusion isn't 'sexy' just now, but it should be. There is no inclusion without disabled people.



Robbie Crowe

Former Chair of Trustees, MACS,
and social model of disability expert

WHY DIVERSIFY YOUR BOARD?

If you're reading this guide, the chances are you're already sold.

The purpose of this section is to give you a framework to reflect on why trustee diversity matters to your charity, as this should be the basis of your approach.

You may need to make the case to others. If everyone isn't on the same page about why trustee diversity matters, then you may be limiting your new trustees in how much they can contribute.

It's as fundamental as ABCD.

Access to talent

Why miss out on all that talent? Without having an open, inclusive recruitment process and reaching out to diverse candidate groups, you are cutting off your own access to huge segments of the population.

Being closer to the cause

Trustees with relevant lived experience of the challenges your charity addresses, or which affect the stakeholders of your charity, will have intimate knowledge of the realities the organisation works with. Having this input on a board is critical to good decision-making. It must be seen as equally valuable to skills and knowledge that have been acquired in a professional context.



Credibility

Accountability to the communities you serve is extremely important on trustee boards. As a result, trustee diversity is a component of a charity's credibility. If someone your charity has supported wants to see who represents them at the highest platform of the organisation, it would send a poor message if they felt they wouldn't be welcome there. Representation on the board is increasingly on funders' agendas – and application forms! Poor board diversity can also adversely affect the trust that under-represented staff or volunteers have in the leadership of the charity.

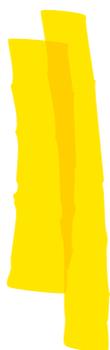
Discussion and challenge

Discussion and challenge are at the heart of good governance.

You need people who are different from each other in order to create this. Further, you need a board of people who are from different circles if you want discussion and debate to be unhindered by fear of contradicting a friend, relative or previous colleague. While this can be mitigated through training and culture-setting, groupthink is a far greater risk on boards that aren't diverse. This is an impediment to good governance.

The Charity Governance Code states that: “The board makes sure that its decision-making processes are informed, rigorous and timely”. Part of ensuring that decision-making is informed and rigorous includes having the relevant skills, knowledge, experience and representation around the table, and ensuring that board members understand that it is their role to debate and challenge.

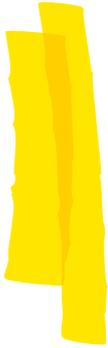
As the Code goes on to say:



“In an effective team, board members feel it is safe to suggest, question and challenge ideas and address, rather than avoid, difficult topics.”⁴

4. [Charity Governance Code](#)

5. [Charity Governance Code](#)



“Board diversity, in the widest sense, is important because it creates more balanced decision making. Where appropriate, this includes and centres the communities and people the charity serves.”⁵



Q CHARITY CASE STUDY

Increasing accountability with a diverse board

When it came to finding new trustees, the previous chief exec had always been designated to find them himself. A lot of those appointments came from a single source – the local Rotary club of which he was a member and with which he and some of the founder trustees had strong affiliations.

I knew we needed to be more diverse. The board needed additional skills and people who were representative of the community: different races, different ages, disabled people and people with lived experience of the services we provide.

I also wanted my role as CEO to be more accountable to the board and to work with them on decision-making rather than me telling them what I was going to do.

We've successfully appointed two new trustees and we have another potential trustee ready to appoint. They are bringing strong skills we were previously lacking, particularly from a governance background.

Two of our new trustees are people of colour and one of our new trustees has lived experience that is relevant to the services we provide. All the existing trustees were very happy with the selection.

Both the new trustees are part of the five-year strategic plan working committee. They are bringing a new energy. They have questioned the function of our newest centre and made some suggestions on how it can be put to better use. It's taught me a valuable lesson. I need a board that will challenge me, work with me and guide me, not just look to agree with my job title.

That's how we will be more successful as a charity.

Tim Archbold
CEO, Signposts



The role of diversity in good governance and organisational resilience

There is evidence that diverse boards are more resilient and innovative. Multiple research studies have demonstrated that diverse boards:

- ▶ Pore over evidence presented to them more closely – because they don't assume that the group is going to reach easy consensus.
- ▶ Are more innovative – because they have more varied life and professional experiences, so will come up with a wider set of possible solutions.
- ▶ Lead organisations that are more economically successful – because they are closer to their users' needs, are less likely to miss key opportunities and issues, and have greater credibility with their communities.

In a nutshell, trustee diversity isn't nice to have, it isn't an add-on and it certainly isn't a favour to the people comprising that diversity: it's of benefit to the organisation. The Charity Commission expresses this in no uncertain terms:

“Charities are missing out on the widest range of skills, experience and perspective at board level. Charities help tackle society's most important challenges, and work with some of the most vulnerable people in our communities.

They are also operating in an environment of increasing public scrutiny. To continue to make an impact for their beneficiaries into the future, and retain legitimacy among the communities they serve, charities need to be smart, agile and creative.

A diverse board can bolster a charity's resilience and give it the best chance of fulfilling its purposes into the future.”⁶

Q CHARITY CASE STUDY

Momentum for change

I'd been CEO of Bexley Voluntary Service Council for five years. We'd always known that we needed to diversify. The Black Lives Matter movement [in June 2020] made conversations both easier and harder, but it did mean that it had become a real live issue. There was momentum, so we took the decision not to postpone the issue any longer and at the next board meeting we started a meaningful discussion about our challenges.

We'd reached a point where several trustees had completed their term of office, so it was a good point from which to start thinking about diversifying. We needed more diversity on the board in terms of both age and ethnicity.

Transform [Getting on Board's trustee recruitment programme] was perfect for our board.

One of the things we particularly valued was the supportive, non-judgmental environment. We could say things like, "I'm worried about writing an ad for recruiting for a person of colour," and get guidance. It was reassuring to hear experiences of other charities – and hear great ideas we could build on – or use ourselves!

We now have four new trustees from different backgrounds and sectors. Previously, all the board members were from the voluntary sector. Additionally, among the new trustees we have two who are Bexley residents and one who is a person of colour.

We also have a robust trustee recruitment procedure now, too. We have a process for application, a formal interview and time for candidates to observe the board.

We're just at the beginning of the process of diversifying our board. We know we're not there yet, but we're definitely on the way.

Vikki Wilkinson

Former CEO, Bexley Voluntary Service Council

COMMON MISCONCEPTIONS ABOUT TRUSTEE DIVERSITY

It helps to remember what trustee diversity isn't:

- ▶ **A euphemism** – When we talk about diversity, it's helpful to be specific. Is there a particular under representation you've identified and would like to address? If so, name it. There is nothing to be shy about. In fact, using diversity as a euphemism can suggest you're uncomfortable with the term you're avoiding. Awkwardly and vaguely referring to diversity when you have specific characteristics in mind will only lead to misunderstanding or unfavourable results for your charity. For example, it's fine to say, "We need to recruit South Asian trustees because it is a strategic goal of our wildlife charity to make our sites more accessible to and inclusive of this local community."
- ▶ **A term exclusively covering a single trait, or visible traits** – How often is diversity equated solely to visible differences, such as gender or race? Particularly following high-profile, culture-shifting movements such as the tragic murder of George Floyd or the #MeToo movement, which thrust a group's experience to the forefront of our mind – often briefly – diversity will sometimes become the false equivalent of one trait due to the discomfort of speaking of that trait. Remember there is a range of possible diversities and that many forms of diversity are invisible.
- ▶ **Lowering the bar** – One of the most damaging perceptions of trustee diversity is that it contradicts the skills, expertise or overall quality of the board. The false choice between diversity and skills demonstrates the misconception that people who are under-represented are less capable or skilled. In reality, having access to privilege does not equate to being more skilled. Those furthest from power are just as likely to be 'outstanding' candidates – they'll just have had to overcome further barriers than peers who haven't faced structural disadvantage. Every single new trustee you appoint should be useful to the board: they want this just as much as you do.

- ▶ **An objective end-point** – It doesn't stop or even start at diversity. Trustee diversity without inclusion and equitable power-sharing isn't meaningful representation. You can have a diverse board which still has specific forms of under-representation. Moreover, our awareness of the different experiences of others, and the correct language to describe them, will grow and change over time. The charity's work and environment will change over time, too, which means a board that doesn't refresh itself is unlikely to stay useful and relevant.
- ▶ **A defence** – Having diverse members, or certain forms of diversity, isn't a defence against allegations a board might face. A diverse board can still make mistakes. A diverse board can even be exclusionary and might not have a fair distribution of power or equal roles in decision making.

The myth of lack of interest in becoming a trustee

A persistent myth acting against trustee diversity is that candidates from under-represented backgrounds aren't applying because they don't want to be trustees. In reality, it's due to lack of awareness of trusteeship, lack of encouragement, lack of access to roles and fear of not being heard once on boards.

Participants across two focus groups that Getting on Board conducted ranked "I don't think being a trustee would be an enjoyable experience" as the lowest barrier to becoming a trustee. Indeed, several spoke powerfully about how they would find the opportunity fulfilling. The myth that under represented groups don't want to become trustees is a real challenge and barrier to board diversity, in large part because it places the onus on candidates and not on those in greatest control of the recruitment process: charities.

A report by Reach Volunteering found that application and appointment rates vary considerably. Younger applicants and applicants of colour are less likely to be appointed than older and white applicants.

"Trustee boards lack diversity, but our data suggests that this is not because of a lack of interest from under-represented groups. Applicants through Reach Volunteering's service are encouragingly diverse, and open recruitment is improving board diversity. However, boards are not recruiting equitably: younger candidates and candidates of colour are less likely to be appointed than older and white candidates. Boards need to adopt more inclusive recruitment practices to close the gap."⁷

7. Trustee diversity: who is applying, and who is appointed?, Reach Volunteering, 2021.

What really stops people becoming trustees?

- ▶ I don't know what a trustee is.
- ▶ I've never seen any adverts for trustees.
- ▶ People like me don't become trustees.
- ▶ I've got nothing to offer.
- ▶ I don't know how to apply.
- ▶ I don't have the time or money.
- ▶ I've looked at who is already a trustee and I don't think I'd fit in.
- ▶ I don't see myself reflected in what they're asking for in the advert.
- ▶ I don't think they would listen to me anyway.

"I SEE IT AS AN OLDER WHITE MALE SCENARIO. I DON'T FIT INTO THAT CATEGORY."

"I WOULDN'T HAVE APPLIED - NOT CONFIDENT ENOUGH. I THINK OTHER PEOPLE WOULD HAVE BEEN CLEVERER THAN ME."

"BEING SLIGHTLY YOUNGER (THOUGH NOT A YOUNG PERSON, TECHNICALLY) I WAS CONCERNED ABOUT HOW I WOULD BE PERCEIVED AND WHETHER I WOULD BE EXPERIENCED ENOUGH TO OFFER ANYTHING TO THE BOARD."

"IT TOOK ME A LONG TIME TO BE CONFIDENT ENOUGH TO APPLY TO BECOME A TRUSTEE, I THOUGHT YOU HAD TO BE OLDER AND MORE EXPERIENCED."

"IF YOU ARE NOT FAMILIAR WITH THE CHARITY SECTOR, THEN YOU DON'T NECESSARILY KNOW THESE ROLES EXIST OR KNOW THAT YOU COULD DO THESE ROLES - THIS INTERSECTS WITH CLASS, AS WELL."

WHAT DO YOU NEED TO HAVE IN PLACE BEFORE YOU RECRUIT?

One of the most damaging misconceptions about inclusion is that you need to wait for the people who comprise diversity to arrive and somehow create an inclusive environment for themselves.

In reality, the existing board has to work intentionally before new trustees are appointed. The board will need to make sure that they have thought about why they are diversifying and about how they will equip new trustees to contribute.

Determining whether you're ready to diversify your board can be like asking how long a piece of string is. While you don't want to rush it, you also can't prioritise perfection over progress – particularly if it means procrastinating over diversifying your board.

You won't like to hear this: there is no set starting point.

But asking whether you're ready to diversify your board is a starting point – and a positive one, at that. Much of the work of diversification and inclusion entails questioning the things we do by default (e.g. how we recruit trustees and the qualities we value in trustees) and taking thoughtful action.

Wanting to diversify your board because you feel you're expected to, rather than because you can see the value it will bring, suggests you aren't ready.

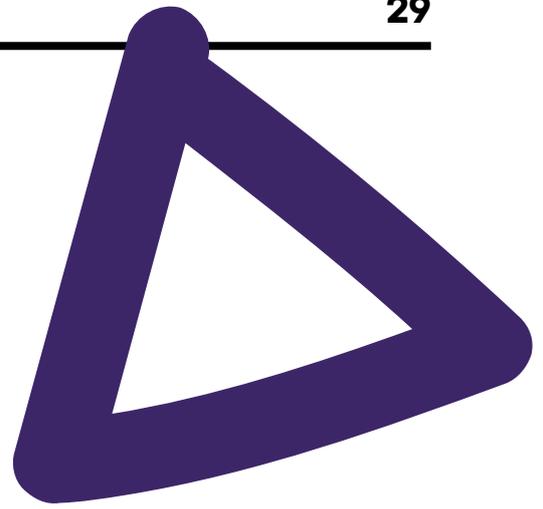
Lots of organisations think they should be doing something about trustee diversity, but they don't know how and they don't know why. They might not have a clear idea of what trustee diversity means or they might think about it solely in the most obvious or visible ways.

There is no shame in bringing in expert support and having open discussions about the work that needs to be done. Reaching out to other sector leaders and learning from their progress, what worked and hasn't worked, can also be immensely helpful.

Some signs that you might not be ready to diversify yet:

- ▶ You don't have the capacity to train and induct new trustees.
- ▶ You have had previous trustee retention issues and you feel that nothing has changed since.
- ▶ Fellow board members perceive diversity and skills as opposing traits.
- ▶ The board is rushing to recruit because it is worried that not being diverse will jeopardise its reputation.

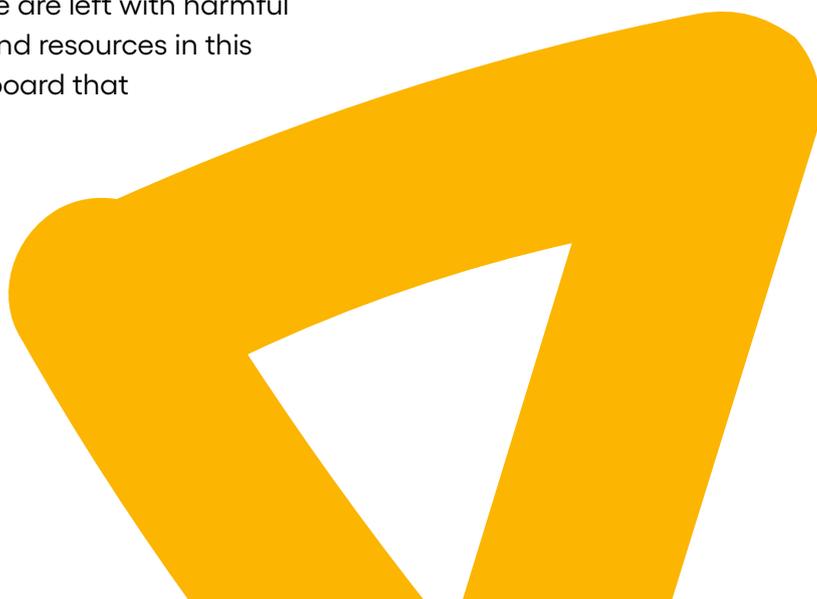
In short, make sure you're doing it for the right reasons, but equally that you're not being held back by wanting to do it perfectly.



Here are some of the things we think you ought to have considered before you start to recruit trustees:

- ▶ **Make sure you have your 'why'** – Recruit for the right reasons: because you genuinely want to listen to and act on diverse perspectives. Otherwise, you won't get the benefit of diverse trusteeship and trustees might not stay.
- ▶ **Examine the 'voice/listening gap' and take practical steps to address it** – If you have trustees who are 'different' from their colleagues, do they contribute as much as the other trustees? Are they being listened to? Are they sticking around? If not, the problem is most likely with you, not them.
- ▶ **Train all your trustees effectively** – This means going beyond standard governance, regulation and policy-based training. Your trustees also need upskilling to operate inclusively as a board. It's worth emphasising that all your trustees need training – not just new or first-time trustees.
- ▶ **Root out exclusionary board behaviours** – These can be as innocuous as over-familiarity, using jargon without context or explanation, failing to explain history (especially if it's still referred to or forms the basis of decisions) and continuing with business as usual, even as the board's make-up changes.
- ▶ **Back up good intentions with policies** – Namely, a code of conduct and an anti discrimination policy (the latter being more uncommon). Policy is just the baseline, but it's helpful to have to reinforce the culture you want to create (or to avoid).
- ▶ **Chair on the right note** – Much of the tone-setting (and re-setting) will fall on the chair of the board. They have the power and responsibility to call out when someone is being shut down, making interventions before exclusionary actions escalate, and reinforcing which behaviours are unacceptable and which are encouraged.
- ▶ **Be honest** – This is a journey. There isn't a magical end point. You may get it wrong, despite your best efforts. Moving beyond fragility and defensiveness to a place of humility and learning will serve your charity tenfold. Moreover, the more honest and open you are about the journey you are on to diversify your board, the more respect and understanding you will earn from the communities you serve.

Inclusion can't be an afterthought if you want trustees who will actually participate, and who won't be harmed by their experience of being on your board. Without inclusion, diversity is an empty performance – one that can actually backfire on your credibility, particularly if people are left with harmful experiences of exclusion. Invest time and resources in this step: you'll be bringing people onto a board that can support them, and the charity will thereby be more likely to benefit from their trusteeship.



"AS A YOUNGER WOMAN, I FOUND THAT SOME OF THE SENIOR PEOPLE I HAVE HAD TO WORK WITH [AS A TRUSTEE] ARE A BIT DISRESPECTFUL."

"MY EXPERIENCE [HAS BEEN] INVALIDATED DUE TO MY AGE."



TRUSTEE TRUTHS



Why boards should have more young trustees

The Young Trustees Movement exists to double the number of trustees aged 30 and under on charity boards by 2024. We'd like it to be the norm for the demographics of boards to reflect the demographic of their communities, including young people.

High-performing, diverse boards will enable charities to have greater impact. Boards with a diversity of perspectives are better able to navigate uncertainty and futureproof decisions.

We need to de-mystify what a trustee does and to enable more people to see themselves reflected in the board.

In the process of recruiting and inducting young trustees, boards should review and clarify their purpose, culture, training and innovate the way they operate.

The work that is required of trustee boards is not rocket science but it does require boards to be open to doing things differently and to have the ability to hold constructive conversations. We hold a monthly free champion training to introduce boards to this process, which you can sign up for [here](#).



Mita Desai
CEO, Young Trustees Movement



TRUSTEE TRUTHS



Are you really ready to embrace greater diversity on your board?

There is no doubt that the face of trusteeship is changing and needs to change. Charity boards need to better reflect the communities that they exist to serve. Diverse boards enable 'different' conversations to take place. So, inclusive leaders build teams and enable cultures that value people with different perspectives and create space to enable their voices to be heard.

The first thing we would say to all charity leaders looking to diversify their board is to pause, and consider why you want to diversify? What problem are you trying to solve and how will diversifying your board help to solve that problem?

Every organisation is different and your journey towards greater diversity needs to be informed by your understanding of where you are now, including knowing who is around the table already. You need to know where you are now in order to understand whose voices are missing.

The next question we would encourage you to ask yourselves is, 'Are you ready to embrace greater diversity on your board?' Consider the environment that you are hoping to welcome diverse candidates into. Is it a safe and welcoming space for someone from the LGBTQIA+ community?

So, this is not just about 'making space' for different perspectives, it's about making sure that when you attract diverse trustees to join your board, that it is a welcoming and safe environment for them to be in. It's so important to consider wellbeing throughout this 'diversifying' process. Lived experience or 'diverse' trustees can often feel a weight on their shoulders as the only person who looks like them on your board, so consider their wellbeing and have an open conversation with them to establish what support they may need and revisit this conversation regularly.

A seat at the table is not necessarily a voice if you don't feel supported and enabled to speak.



Kevin Taylor-McKnight
#QueerTrustees/#CharitySoStraight

OTHER CONSIDERATIONS

Is it legal to advertise for under-represented trustees?

In short, yes, you can advertise for under-represented groups and encourage their participation in your recruitment process.

Boards and charity managers will often share hesitancy and confusion about whether they'll get in trouble for trying to diversify their boards. Organisations may wonder whether they need to dance around the matter of who they're trying to reach. Sometimes the fear behind this is the possibility of offending the target audience (the trustees who would diversify their board) and appearing tokenistic. At other times, they're worried about backlash from people who may feel excluded from the process.

For those familiar with the term from staff recruitment, 'positive action'⁸ does not normally apply to trustee recruitment, because trustees aren't (usually) employees, members, service users or paid for their services. In any case, taking proportionate steps to include under-represented groups isn't a form of 'positive discrimination' – it's addressing exclusion and removing unnecessary barriers to diversifying your board.

We can't emphasise this enough: if you are looking for under-represented trustees who will improve your governance and bring expertise to support your charity to deliver its strategy – and, after all, you shouldn't be recruiting them for any other reason – you are already selecting the best trustees for the role.

No one wants tokenistic recruitment, least of all the individual you have appointed. This doesn't change the fact that board diversification will require targeted efforts to reach under-represented groups to encourage their participation in the recruitment process. These are meaningful steps to redress an imbalance that would otherwise have been repeated in your recruitment processes.

There are some circumstances in which charities have specific permission to restrict their trustee membership to certain groups (e.g. women-only trustees of women's refuges).

It can also be justified in certain circumstances to restrict trustee membership to people from the same minoritised community as those with whom the charity works. Examples of this might include deaf and disabled people's organisations, or organisations providing services to those of a particular religion or belief.

8. Equality Act 2010: What do I need to know? A quick start guide to using positive action in recruitment and promotion, Government Equalities Office, 2011.

Paying trustees

Most trustees are unpaid volunteers. In England and Wales, however, if your governing document allows you to, you can pay trustees for the time spend as a trustee where this would otherwise be a barrier to their participation. This is payment of trustees for inclusion purposes, not for the range of other situations in which you might be able to pay trustees.

We don't go into detail about paying trustees in this guide. You will need to check your governing document and your regulator's guidance to ascertain whether you are allowed to pay trustees and how.⁹

However, paying a trustee will only ever be one part of a possible solution to diversifying your board and only suitable in some circumstances.

Paying expenses is a different issue. A key part of diversifying your board will be to make it easy and discreet to claim out-of-pocket expenses. These can include travel and accommodation expenses, and childcare. Some of your trustees might need you to pay these expenses directly (e.g. arranging and paying for travel on their behalf), rather than reimbursing them.

"IF YOU WANT TO DIVERSIFY BEYOND MIDDLE-CLASS GROUPS, YOU ARE GOING TO UNDERSTAND THAT PEOPLE ARE TAKING A [FINANCIAL] HIT. IF YOU FEEL UNCOMFORTABLE TALKING ABOUT THAT, IT CAN BECOME A REAL ISSUE."

⁹ [Guidance: payments to charity trustees: what the rules are](#) (England and Wales); [Remuneration \(Paying charity trustees and connected persons\)](#) (Scotland); [Making payments to trustees](#) (Northern Ireland).



SECTION 2

PRACTICAL TIPS ON DIVERSIFYING YOUR CHARITY'S BOARD

Now that we've outlined the landscape, purpose and approaches to trustee diversity, we will focus on the practical steps to diversify your charity's board.

Many of these steps are simply best practice in trustee recruitment. In our opinion, this further affirms that it isn't rocket science – it's just the basics of a professional trustee recruitment process.



WORK OUT WHAT YOU NEED

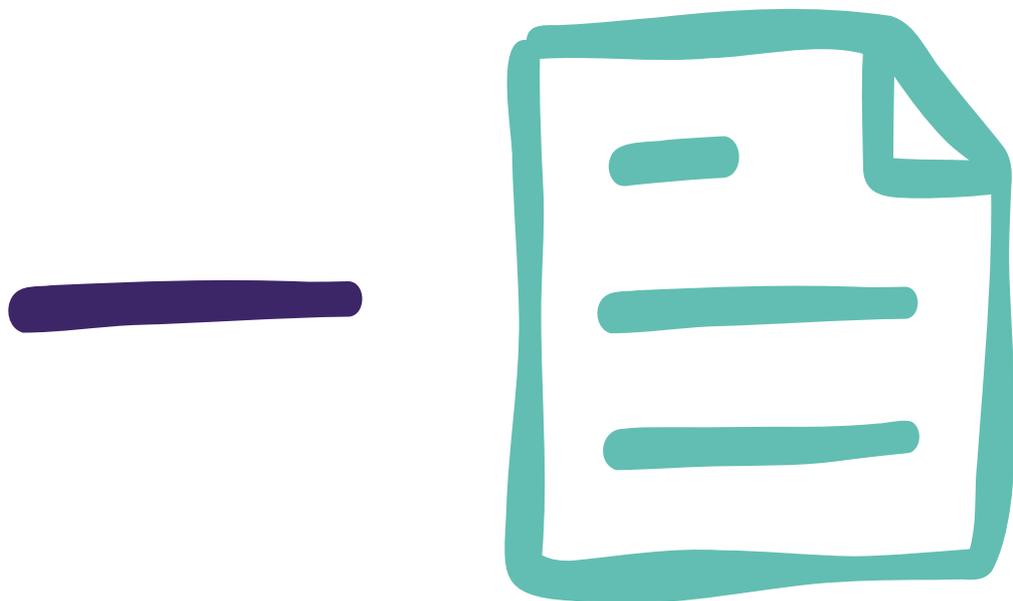


This portion of the trustee recruitment process will form the basis of your advert, marketing and selection criteria, and ultimately the trustees you end up with. Working out what you need is a very important first step, if not the most important step.

We often see trustee boards seek an almost formulaic list of professionals to fill the roles on their board: a lawyer, an accountant, etc. In reality, a board should base vacancies on the organisation's strategy. Recruiting multiple trustees can be helpful, so that one person does not need to address every single gap on your board.

We recommend starting with a board audit. This is like a skills audit, only more holistic. It involves identifying areas where your board could be more representative and diverse, and will help you make an evidence-based decision.

Remember that the audit isn't going to tell you you're bad, give you a fail or somehow beat you with a stick: it's to acknowledge what you already have and identify what you need next. A good board audit can also help you identify existing skills or perspectives you didn't know you had – let alone use – among your current board members.





Education and Employers

Because so much diversity is invisible, it's important that you provide an opportunity for board members to share the characteristics and areas of lived experience they possess. However, you must make it clear that this isn't mandatory. Although a board audit should be anonymised, members may still be identifiable due to the limited number of participants. Board members aren't obligated to share sensitive information they might not otherwise feel safe revealing, particularly in relation to protected characteristics and lived experience. Ultimately, it's a helpful guide to what exists and what's missing or under-represented on your board.

Then, reflect on your organisational strategy. What is your charity seeking to achieve and what does your board need in terms of skills, knowledge and experience to achieve that?

It helps to ask these three questions to guide what you need next:

1. **What challenges and opportunities is your charity likely to face over the next 5 years?** You might have a formal strategy that outlines the direction of the organisation, or there might be a shared understanding among the trustees which hasn't been written down. For example, you might want to deliver more services online, expand and diversify who uses your services, launch a new type of service or improve your marketing.
2. **Do your trustees have the main skills, knowledge and experience (including lived experience) to tackle these challenges?** (Take into account trustees leaving in the foreseeable future.)
3. **If not, what's missing?** This will form the basis of your trustee recruitment.

"WHERE I HAVE SEEN OR FELT THAT I AM A TOKEN, IT'S WHERE THE ROLE HASN'T BEEN DEFINED PROPERLY."



TRUSTEE TRUTHS

Why no one considers board members' sexuality and why they should

Diversification of boards has gained some momentum over recent years, particularly following the Black Lives Matter movement. But it's so important to consider who isn't being included in that diversity conversation, and you will only understand this by carrying out diversity monitoring.

The diversity journey will of course look different at every charity, but we would say that one step to greater diversity is to consider all of the protected characteristics when you're carrying out any diversity monitoring [for trustee recruitment and for employee recruitment]. Discussing sexuality may still feel awkward or uncomfortable to some, but if you don't monitor against all of the protected characteristics of the Equality Act, then you don't know who your charity is failing to reach, what voices are not being heard, and which communities are not being represented.



Kevin Taylor-McKnight
#QueerTrustees/#CharitySoStraight



RUN AN OPEN RECRUITMENT PROCESS

It's common sense that advertising openly will give your charity the best chance of finding the trustees it needs.

But running open trustee recruitment processes still isn't common practice.

If you haven't openly recruited trustees before, please don't beat yourself up. Evidence suggests that you've been in the majority. Many of us who are current trustees were recruited through informal methods.

However, recruiting from within our own circles is the leading culprit for the trustee diversity crisis.

What does your governing document say?

You must check your governing document for the rules on how you are required to appoint trustees. But if the board feels that the rules are limiting its ability to diversify, the board might want to think about changing the governing document. In particular, recruiting some or all of your trustees from your membership or through nominations, can be limiting. We have worked with many organisations that have changed their governing document to allow them to recruit more non-members, or to allow people to become a member at the point which they join the board.



Persuading your board

Trustees and staff members can find themselves in the position of needing to persuade their board why trustee diversity matters. Here are a few tips based on what has worked for other organisations.

- ▶ **Use the business case** – Having a board crammed full of trustees with relevant experience and knowledge is one of the best ways an organisation can build capacity and resilience. And, after all, there's nothing better than getting more help for already stretched trustees. Many hands make light work.
- ▶ **Cite organisations the board will take notice of** – Your trustees don't need to take your word for it. Share what regulators, funders and the governance code say. They are vocal about the need for boards to be recruited openly, to avoid groupthink and reflect your communities.
- ▶ **Point to good practice in other organisations** – If there are other organisations in your field recruiting openly, point them out. Your organisation doesn't want to be left behind.
- ▶ **Link it to your strategy** – What is your organisation seeking to achieve? Does it want to raise more money? Does it need to increase and expand who is using its services? Is it aiming to run more digital services? Expanding your trustee base should be linked to your ambitions.
- ▶ **Open recruitment** – Openly advertising for trustees is the first step and is often palatable to boards. Why wouldn't they want to maximise their chances of finding decent trustees? If your charity is large enough to have staff, it can be helpful to draw a parallel with staff recruitment. Most organisations wouldn't dream of recruiting staff through word of mouth alone.
- ▶ **Avoid offending board members** – Sometimes, boards bristle at the suggestion that they may not have all the skills, knowledge and experience they need. Make it clear that this is designed to future proof your ambitious charity. This is something all forward-looking trustees want to do.



🔍 CHARITY CASE STUDY

Open evenings for open recruitment

Hannah, the CEO of a medium-sized charitable body, was feeling ground down. For over five years, she had been beating the drum for a refresh of the board, with new trustees brought in from a wider range of skills areas, backgrounds and experiences. It had been to no avail. Her charity's services were stagnating, poor funding needed to be addressed, and service users were not well represented in board decisions.

Yet the chair, emboldened by some of the other trustees, continually pushed back.

"We did have a stab at open recruitment but it failed miserably. One good candidate was vetoed outright. The selection committee said he wouldn't fit in. I found out later it was because he came to the interview wearing a hat," says Hannah.

A change of chair brought a new perspective and in November 2020 the board tentatively agreed to a round of open recruitment.

Recruiting with confidence

To kick things off, Hannah and the new chair, Jo, arranged a series of virtual open evenings where they showcased the charity's services, and talked about what skills and experience were needed for the charity to move forwards, and the time commitment they were looking for from trustees.

That they were able to attract 13 strong applicants at the height of the pandemic is testament not only to their individual commitment, but to the power of a well-conceived and -executed open recruitment strategy.

"We were looking for two or three trustees, so we decided to interview 11 out of the 13 because we recognised that they were a diverse bunch and we wanted to give them all a fair crack at the whip," says Hannah.

The applicants who weren't called for interview were people whose skill set and professional experience was in finance, which was already well represented among the existing trustees.

The trustees were confidently able to make that decision, one which many boards would struggle to justify, thanks to a board skills audit. The accurate assessment of where their deficit actually lay, gave them the confidence to do so, rather than forcing them to rely on a pre-conceived notion of what skills a trustee 'should' have.

A refreshed board

The recruitment process resulted in five new trustees, which the board appointed in staggered stages, making sure a full induction brought those without previous board governance experience up to speed.

“Now our board composition has changed,” says Hannah. “Previously we were eight men and three women. Now we have 12 trustees, with more women than men. Two are people of colour and a third is non-British. Three are in their 30s, one is in their 20s and there are now more people on the board in paid employment than retired. We have some way to go in terms of representing our demographic, but it’s much better than it was.”

[Names have been changed.]



Q CHARITY CASE STUDY

How we transformed our board

Historically, when we made appointments from our existing networks, the candidates always had a similar background. They were generally retired. We've always had a good gender balance, but there were no different social classes and no different ethnic minorities, so the diversity pool was pretty limited.

We did a round of open recruitment in 2019–20. While it was really good for us to do open recruitment and we had some gains, it wasn't completely successful.

Why it didn't work

50% of people who applied were people we already knew, so we weren't reaching beyond our own network. We still didn't hit any of the characteristics that we wanted to be more representative of our community.

[With Getting on Board's help] we got solid advice, feedback and suggestions on how to change the language in our adverts and how to distribute to specialist LinkedIn groups. We certainly managed to reach beyond our networks; we got interest from people we'd never heard of.

Overall, it very much gave us the understanding that encouraging people from different backgrounds isn't enough.

The board was very wary of tokenistic appointments, so we examined the intersectionality between skill and experience. [The new process] helped us target our efforts accordingly.

Board diversity as a result

We've appointed three new trustees from one round of open recruitment as a result of [our change of approach].

The new trustees all have the skills, knowledge and experience we wanted. One of them is 21 and passionate about their community. Finding young trustees had been a big challenge previously. This person found us through our advert with the Young Trustees Movement.

Another trustee is on the advisory group of the Young Trustees Movement, which is helpful for our work with young people's organisations. It means we don't just rely on asking [our young trustee] what they think.

All three are first time trustees, so that is bringing change to the board culture.

I'm expecting the far-reaching impact to be around policy and how we might broaden our grant making out. Those trustees will be instrumental in that.

Caroline Taylor

CEO, Essex Community Foundation

REMOVE UNNECESSARY BARRIERS

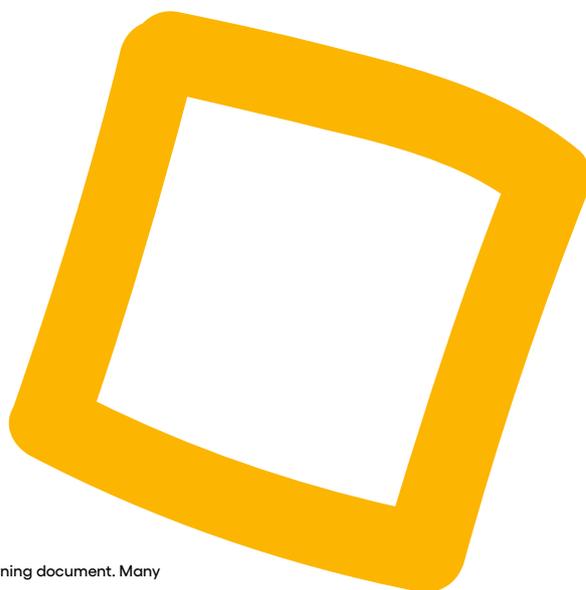
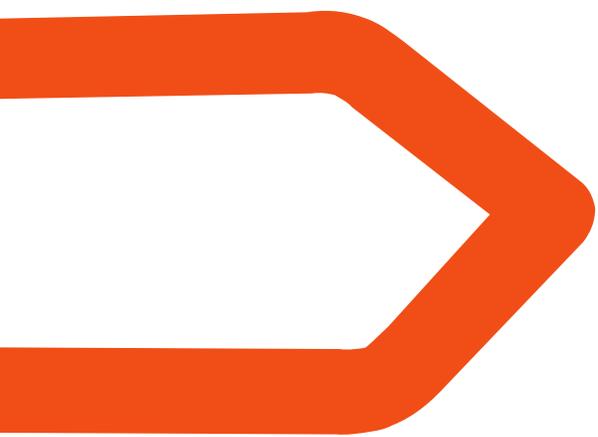
We emphasise ‘unnecessary’ barriers because, by definition, any criteria will form barriers to people who are ineligible.

It's worth cutting out any barriers that may unintentionally be limiting your candidate pool and excluding the very people you're trying to reach. The path to a limited and homogeneous talent pool is paved by 'this is the way we have always done things', so interrogate your process and criteria closely.

This means considering the following:

- ▶ **Do trustees need board experience?** – While expecting or even simply desiring board experience might appear reasonable, in reality it directly excludes various groups that are under-represented in trusteeship.
- ▶ **Do trustees need a detailed understanding of charity governance or an ‘understanding of their legal responsibilities’? Or can training be provided?**
– These requirements implicitly advantage existing trustees and people with access to trusteeship within their networks. Why recruit for what can be taught? Many individuals have all sorts of experience that would be hugely useful in a trustee role, but don't yet know anything about trusteeship.
- ▶ **Do trustees need a degree?** – The requirement to have a miscellaneous degree is unhelpful and outdated. It communicates exclusion on the basis of education level, which closely relates to socio-economic class, and reproduces existing under-representation. Further, while some professions do require degrees (e.g. law, medicine, accountancy), it is likely that you'd be seeking those candidates for their professional skills, so it's already a given they have a degree.
- ▶ **Is your language off-putting?** – Be careful about using phrases such as 'at a senior level' or 'significant senior experience'. This can exclude even those who do have substantial experience or expertise in a specific area, largely because 'seniority' is subjective and has a confidence correlation. The word 'senior' can also be seen to imply older candidates.
- ▶ **Are you using gendered language?** – Use online 'gender decoder' tools to check. While this is an imperfect psychological tool, it can help you understand if your wording is skewed towards specific candidates.

- ▶ **Are your meeting times excluding people?** – If your meetings take place at 3pm on a Wednesday, for example, the chances are that parents on the school run will be ruled out. Evening or weekend meetings might exclude people with caring responsibilities (which has a correlation with indirect gender discrimination). But meetings during office hours might be difficult for people who work shifts or for those more junior in their careers. The fact is that there is no single time that suits everybody – you're going to need to work out with your board what suits the most people every time you recruit new trustees.
- ▶ **Are you paying trustee expenses as standard?** – If you aren't advertising that you pay expenses, it will discourage applicants who may have been willing to take on an unpaid trusteeship, but can't afford to be out of pocket. This will impact working-class or low-income candidates more than other groups.
- ▶ **Can people get to your meetings?** – Meeting virtually at least some of the time may be a helpful option, although this too may be difficult for trustees without digital access. Providing options to people (e.g. coming into the office – if you have one – and dialling in from there) can be helpful. Be flexible and willing to compromise (e.g. alternating virtual and in-person meetings, and meeting times).¹⁰
- ▶ **Does the time commitment have to be the same for everyone?** – Time commitment for trustees can be higher in smaller organisations, where there are no or few staff, and trustees are likely to need to be more operational. But in these cases, trustees are really undertaking two sorts of volunteering: governance and operational. If new trustees are time-constrained, do they need to undertake operational volunteering (e.g. ambassadorial engagements, fundraising)? Or is their input so valuable to the organisation that they could just undertake a governance role as a trustee?
- ▶ **Could you re-think board positions?** – Could two people take on the chair role as co-chairs? Could vice-chairs help share the load? This also helps with succession planning. Be creative within the confines of your governing document. And if your governing document is restrictive, think about updating it.



¹⁰ Charities can have virtual or hybrid board meetings only if they are allowed by their governing document. Many charities are currently changing their governing documents to allow for this useful option.

Don't assume that candidates know about trusteeship

Assuming knowledge about trusteeship can be an unnecessary barrier, primarily because it benefits existing trustees or people with access to trusteeship through their social networks. As the old adage goes, don't assume anything. Especially not prior knowledge of trusteeship. Remember that many people, including those with the skills you seek, may not have heard of trusteeship. Even if they have, it may be so far outside their circle that they are unfamiliar with the responsibilities involved or think it isn't open to 'people like them'.

Defining key terms and concepts isn't spoon-feeding, it's a reasonable action considering the trustee landscape and lack of access to information about such opportunities.

Don't implicitly or explicitly assume that your potential trustees know:

- ▶ That they want to be a trustee.
- ▶ That trusteeship is open to them.
- ▶ What a trustee is.
- ▶ Anything about your charity.
- ▶ How to apply to become a trustee.
- ▶ What a typical trustee recruitment process is.
- ▶ How to behave as an effective trustee – current trustees may not know this either!

"[TRUSTEESHIP IS] BESTOWED UPON PEOPLE WHEN THEY HAVE A LOT OF INFLUENCE, POWER AND SUCCESS: I DIDN'T KNOW YOU COULD APPLY TO BE A TRUSTEE."

"IT'S ALWAYS WHITE MEN, SO I NEVER SEE MYSELF IN THIS DESCRIPTION. READING THROUGH THE DESCRIPTION OF WHO YOU WERE LOOKING FOR MADE ME THINK IT COULD BE ME."

Defining trusteeship

Describing trusteeship in plain English isn't as daunting as it may seem. The Charity Commission for England and Wales provides a useful definition:

“Trustees have overall control of a charity and are responsible for making sure it's doing what it was set up to do. They may be known by other titles, such as: directors; board members; governors; committee members.”

“Whatever they are called, **trustees are the people who lead the charity and decide how it is run.**”

We have bolded the final sentence because it covers the role in a nutshell.

This principle of speaking in plain, factual terms will benefit your organisation in recruiting a wider range of trustees. Try to avoid jargon. Think about it this way: everyone who understands the buzzwords we come to rely on in the charitable sector will still be able to follow you if you use clearer language and you'll be including far more people in the conversation.

What puts potential trustees off?

Potential trustees may be put off by your charity's lack of current diversity. This is difficult to overcome but the best advice we can give you is to be honest about your desire to improve. You should also think about the impression they will get when they research your organisation. What will they think when they look at your current trustees' biographies, for example? Are they eye-wateringly intimidating? Could you show your trustees' human side by asking them to speak about why they became a trustee for the charity and what they have enjoyed about it?





Education and Employers

Getting the best out of your applicants

When you put applicants at ease and offer support, everyone benefits. Your board will have an easier time assessing applications against your selection criteria when candidates have the opportunity to shine.

Think about:

- ▶ **The application medium** – Some applicants will be more comfortable recording a two minute video rather than writing a cover letter. Give them options.
- ▶ **Providing a chance to ask questions** – It's a great idea to have a Q&A session for potential applicants, where they can find out more about the charity and meet current trustees. Make it short, accessible and expectation free. A short online session can be ideal.
- ▶ **Being clear** – Specify which questions or topics you'd like applicants to write about in their cover letter or talk about in their video. Or use a short application form that guides them to tell you what you want to know.
- ▶ **Giving sufficient notice** – Give people plenty of notice for when and where interviews will take place. It also helps to send applicants interview topics or questions in advance of the interview.
- ▶ **Providing reassurance** – Actively put applicants at their ease in interviews and emphasise that it's a two-way conversation.



TRUSTEE TRUTHS

Creating an environment in which young trustees can flourish

Following my year as an ambassador of the Young Trustees Movement, I've had a lot of time to reflect on the ways in which trustee boards can build inclusive environments for their members. One important area is the language that is used to talk about board members. I thought about a board that I had been on where I had been described several times as "the young trustee". We called the co-ordinating fulcrum of the board the "Chair". We called the finance expert the "Treasurer", so I thought nothing of the fact that I had a defining adjectival phrase. I was, after all, six years junior to the next oldest member of the board. I had been brought onto the board in order for the youth charity involved to make decisions more closely aligned with those it sought to help.

It was only when chairing an event at a major political location that I realised something wasn't right about that label. I introduced myself almost automatically as "the young trustee" on the board and was reminded by my fellow discussant that "you're on the board now, you're a trustee.

That made me think quite deeply. It would never be appropriate to reduce me to another protected characteristic when introducing me as a board member. I am never "the black trustee" or "the trustee with a disability," so why should my age define my engagement with the board?

When people think about trustee boards, they tend to (quite reasonably) think about retirees; they are guys (quite literally) who have "seen it all and done it all." When young people join boards, we are stereotyped as bringing little knowledge and not being able to sufficiently judge risk by reference to a large body of experience.

By describing myself as "the young trustee" I was playing into that stereotype. That I need a diminutive warning label in order for stakeholders to not take me too seriously. To show people that I don't have sufficient confidence in my own abilities to fully believe what I'm saying. None of that is true. In many ways, I was the real expert on the board.

That charity works with and for young people. I was recruited to that organisation as a recent beneficiary who could provide a detailed insight into what it is like to receive its programmes. I knew better than other trustees how our programmes were received, and I was an example of how the charity could make a long-term difference to the lives of those it touches.

I've had enough of the narrative that young people are the leaders of tomorrow. Quite often we are serious professionals who should be empowered to make decisions. Real respect for our agency, and a real seat at the table, will see us treated as fully enfranchised leaders of today without asterisks, limitations or restrictions.

If I could have spoken to myself five years ago, I would have stopped myself from uttering the word "young". I would have reminded myself that I was on the board now, I had an equal voice, and that I was a "Trustee."



Abiodun Olatokun
Ambassador, Young Trustees Movement



My trustee experiences

REBECCA BROAD

“The wording of trustee adverts is important

I'd been volunteering for the charity [where I'm a trustee] for a number of years. My notion of what a board was had been formed from when I saw the members of the board walking around the office. They were older than me, a bit scary and had loads of power. The advert I saw was in the members' magazine. It said, 'We particularly encourage applications from people who are in the age group 1830.' I thought, 'That's me!'

Challenges I brought up around diversity, equity and inclusion led to the establishment of a nominations committee

Everyone comes from different professional backgrounds and that brings in a lot of different skills. When I ran the skills audit we identified the 24 skills we needed on the board and we covered about 23 of them. Age range is a lot more diverse than it has ever been and the gender balance is good. However we're not very racially diverse and our board is skewed towards higher incomes.

The imbalance of income is the thing I've found hardest

When I joined I was a part-time disabled student. I had to spend a fiver to get a bus to the meeting and at the time that was a lot. I would look at the sandwiches left at the end of the meeting and think they would have sorted me out for the week.

Income can skew discussions about spaces, too

I'm the only inner city trustee so I bring a different perspective to the board. This plays out even in informal discussions. People would talk about what flowers were coming up in their garden. At the time, I didn't have a garden and people were talking about travelling to Africa and following the ospreys down the east coast.

Being on a board has allowed me to realise that what I think and what I decide are important

My scientific background helps when there are certain decisions to be made; something like reintroduction of species that is controversial and requires up-to-date research. I feel confident looking into that. The young people thing is important if we're looking at a campaign to get young people to engage. And my media experience is valuable too. Being part of a board decision and taking a vote has an impact, and multiple people trusting me with that is important and empowering.”

Rebecca Broad is a freelance writer, social media manager, and organic content strategist. She is a trustee for a wildlife trust and passionate about saving the planet.



RECRUITING FOR LIVED EXPERIENCE

Lived experience in the context of trustee diversity is personal experience of what the charity is seeking to tackle.

This could be lived experience of being unemployed, of having a particular illness or of being in the care system.

Lived experience must be held in the same esteem as professional experience. It is equally valuable to the organisation in its effective decision-making. In reality, lived experience is under-represented on boards, and often under-valued when boards do have trustees with lived experience.

It is common for trustees with lived experience to feel both vulnerable (because they are sometimes talking about painful, personal experiences, when other trustees are not) and under-valued because they aren't necessarily included in the wider business of the board.

Trustees with professional and lived experience can of course be one and the same people. Either way, you shouldn't assume that people with lived experience, who may have different social or professional backgrounds to other trustees, are somehow incapable of getting their heads around board business. The onus is on you to adapt, so that your whole board can meet its responsibilities, contribute fully to the charity and enjoy the experience.

Note that 'lived experience' is a useful term in the context of discussing trustee diversity, but is unlikely to mean much to the outside world when you recruit. Be more specific.



Here are some considerations if you plan to recruit trustees with lived experience:

- ▶ Will the trustee be a current service user and will that present any conflicts of interest? Some charities prefer to appoint trustees who have been service users but who are no longer accessing the charity's services, or people with similar life experiences to service users.
- ▶ How will you provide them with the emotional support they might need? (One trustee with lived experience described her traumatic experience of being a trustee as "bleeding on the boardroom floor".)
- ▶ Have you been explicit that you don't expect trustees to give details of their own experience? They will use their lived experience to inform decision-making, but this doesn't mean that they need to share personal details.
- ▶ If trustees' lived experience is ongoing, how might this affect their trustee role? For example, if they are ill or vulnerable. How do you intend to accommodate this?
- ▶ Does an applicant's lived experience mean they need specific support to serve as a trustee? For example, a trustee with learning disabilities might need board papers presented in a different format, or extra sessions with the chair or charity manager to go through them.

In its excellent resource on lived experience on boards, Bayes Business School says:

"Obviously one or two trustees are not representative of the whole population (and shouldn't be expected to provide that representation) but their voice, personal experience and network of other people with lived experience of the cause can be a significant starting point and source of current thinking and upcoming policy changes, and importantly, can offer stories that can be told and shared that bring authenticity (and a degree of accuracy) to the charity's reason for being and how it delivers its mission."¹¹

11. [Lived experience on nonprofit boards](#), Bayes Business School.

TRUSTEE TRUTHS



People with lived experience must be represented at board level

We need to be more nuanced in our thinking to reimagine leadership within the social justice and criminal justice sectors. I use these two as an example because I have worked within these sectors over the last 12 years, and I have seen the power dynamic at play. However, I am aware that these issues are not limited to these sectors.

Our boards should be representative of the beneficiaries they serve. People often perceive having a trustee with lived experience as the right thing to do, instead of recognising that homogeneous boards don't deliver the best outcomes.

There is an assumption that individuals with lived expertise are limited in what they can offer. Therefore, lived experience experts are made expendable contributors rather than invaluable ones. Imposter syndrome is a reality for anyone pushing their personal boundaries to develop themselves. But this experience is perpetuated by boardroom practices that do not foster enabling environments or safe spaces.

Boards often lack lived expertise because they are not set up to deliver equity. Once new trustees are recruited, we must think about providing equity and examine the processes and practices within our board rooms and consider whether they create conducive environments for those with lived experience. Where possible, this process should be done with an external consultant who can look at the board objectively and provide recommendations. We need to be willing to take on uncomfortable findings and implement the relevant changes. Some people with lived experience will need to be developed in the role and may require a period of adjustment before they can start making meaningful contributions using their lived experiences. They shouldn't be rushed and expected to dive straight in.

In the future, I would like to see a range of diversity, thought, expertise and skills on boards. Hopefully, this will produce equal respect and value for trustees with lived experience. Established board members will acknowledge their privilege and use it to make space for unprivileged trustees entering the board. We need to flatten the hierarchical structures often present at board level.



Nola Sterling

Elevate Project Manager, Criminal Justice Alliance

BOARD SHADOWING **SCHEMES**

Progress to boards: If you're offering a shadowing scheme, make sure it isn't a dead end.

We often speak with charities that are considering offering a pipeline scheme, such as a shadow board, as an alternative to board membership, particularly for first-time trustees. By 'pipeline scheme', we mean a programme to give aspiring trustees some exposure to trusteeship without actually becoming a trustee. This can be extremely valuable to potential trustees.

Pipeline schemes can take the form of offers to:

- ▶ Join or co-found a shadow board, advisory board or steering group.
- ▶ Provide informal feedback to the board.
- ▶ Shadow a particular board member.
- ▶ Shadow the whole board as a board apprentice or observer trustee.

However, you should avoid suddenly creating a new pipeline scheme as an ad hoc response to receiving promising applications from applicants who the board can't accommodate either because of numbers or because they aren't eligible for full board membership.

The aims of the pipeline scheme are critical. Ask yourselves the following questions:

1. Will the scheme have a clear, guaranteed pipeline to the board (i.e. first refusal when the next trustee's term ends) or will it put the applicants in the pool to be considered in the next recruitment round?
2. Will it give applicants training, experience and opportunities to become trustees elsewhere? Does your charity have capacity to facilitate this?
3. How will you distinguish shadow trustees' responsibilities from those of full trustees and how will you communicate this?
4. Is the pipeline scheme necessary or do you just need better support structures built into the board itself?

If you're unclear about your pipeline scheme's aims, it will be unclear to applicants and could lead to confusion. This is a breeding ground for mismatched expectations.

Reasons not to create a board pipeline scheme:

- ▶ To provide a consolation prize for unsuccessful applicants.
- ▶ To restrict first-time trustees to non-trustee opportunities.
- ▶ Because you are procrastinating or trying to prevent your board from diversifying.

If you are thinking about creating a pipeline scheme, we recommend:

- ▶ Creating the opportunity in advance of your trustee recruitment and advertising it as a separate avenue. This means people can decide which one they want to go for – it gives applicants agency, doesn't patronise them and allows those who might feel uncertain about trusteeship to get a taste of it.
- ▶ Diversifying your board alongside promoting the pipeline scheme – one doesn't have to prevent the other.
- ▶ Resourcing the pipeline scheme (including training, induction, support, expenses, structured offerings and time frames).
- ▶ Thinking about existing structures you might use to support succession planning (e.g. inviting people to join subcommittees).



We emphasise that first-time trustees – and trustees perceived as not being the usual candidates – shouldn't be restricted to pipeline opportunities.

This still stands even if individuals were previously unaware of trusteeship. You can and should train them. All trustees were first-timers once and all still require regular refreshers. Regardless, we urge you to ensure that by creating a pipeline scheme you aren't pigeon-holing candidates.¹²

Dr Ambreen Shah is a Trustee at Smallwood Trust and Charity Bank. Diversity, equity and inclusion are key interests for her, in particular shifting power to people with lived experience. She is currently championing board shadowing as one way to support a greater diversity of people in the charity governance space.

She says:

“When you are successful at securing a trustee role – ask yourself: do people with lived experience of the issue your organisation seeks to address have any real power to make decisions, be heard and access resources directly? If the answer is ‘no’ then do something about it. I simply said to my CEO and Chair [of Smallwood Trust] I would like to have women with lived experience of poverty shadow me – I took on the responsibility to support them knowing I would get so much more back in return. I can already see that this is potentially a fantastic pathway to succession planning – to onboard someone in a light, gentle way – demystifying what a board is and does.”



¹² Nonprofit recruitment consultancy Prospectus has a useful webinar on [board shadowing](#).

GETTING YOUR ADVERT RIGHT

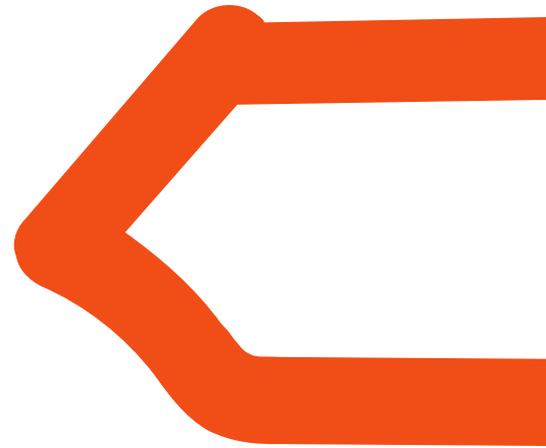


Nothing is more within your grasp than the advert you produce.

It's the key evidence you're putting out there about your charity, what it values and who it seeks to have at the seat(s) of decision-making. Your advert enables readers to make evidence-based decisions; so make sure it communicates what you intend to share.

There is every possibility that someone reading your advert – if they're familiar with trusteeship at all – will have preconceived notions about trusteeship not being for them. Your advert can dispel preconceived notions that might discourage someone from applying, and show that your charity is an inclusive and motivating environment to join. Your advert is the primary opportunity to demonstrate what you're all about!

The advert could be supplemented by a video on your website and social media. And if you don't have video editing resources, think about getting your trustees to record themselves talking about why they became a trustee and what they love about it.¹³



13. Here's a great example of a trustee video from [Flamingo Chicks](#).

What not to include in your advert

Here are a few excerpts of real adverts demonstrating some of the typical pitfalls. Remember, just 10% of trustee vacancies are ever advertised, so well done to these charities for openly advertising their trustee vacancies. With that said, here are a few things we can learn from them.



“The Role will

- ▶ Support the Director in implementing the organisational vision and strategy.
- ▶ Be a company director of xxx fulfilling all the statutory requirements of that role and complying with the requirements under the Companies Act 2006.
- ▶ Actively fulfil the duties of a charity trustee and be familiar with these responsibilities.”

Limiting factors:

- ▶ How many current trustees can describe the Companies Act 2006 to you? Referencing legislation, particularly without context or examples, may intimidate potential applicants. This may inaccurately suggest that aspiring trustees already need to have detailed knowledge of the legislation affecting charities. This is niche knowledge and skews towards current trustees, meaning you may reproduce the same under-representation and inequalities that exist in the current trustee body.
- ▶ Naming without clarifying: what are the requirements? The advert mentions fulfilling all the statutory requirements of a role, without outlining what they are. This is an ineffective way of achieving the aim of communicating that there are requirements to adhere to. Again, how many current trustees could give you a list of statutory requirements from memory? This detailed knowledge not only requires initial induction training, but typically refreshers, reminders and even legal advice during the course of trusteeship. Trustees must understand their legal responsibilities, but listing them in an advert is not going to encourage applications from a diverse set of candidates.



“This is an exciting opportunity for three senior professionals... to join xxx as a Trustee. We are seeking applications to fill vacancies on xxx’s Trustee Board with high calibre of people...”



Chichester Ship Canal Trust; photography by Dave Standley

Limiting factors:

- ▶ ‘Senior professionals’ can mean many things: people with management experience, expertise in a specific area or specialism, or decades of experience in a profession. Regardless, those defined under ‘senior professionals’ are unlikely to be young people.
- ▶ Words like ‘senior’ might put off people you would consider to be senior but who do not identify with the term themselves.
- ▶ Similarly, elitist terminology is likely to put off candidates – even if they meet the description. ‘High calibre’ suggests exclusivity and potential classism. Most people would not describe themselves as ‘high calibre’.



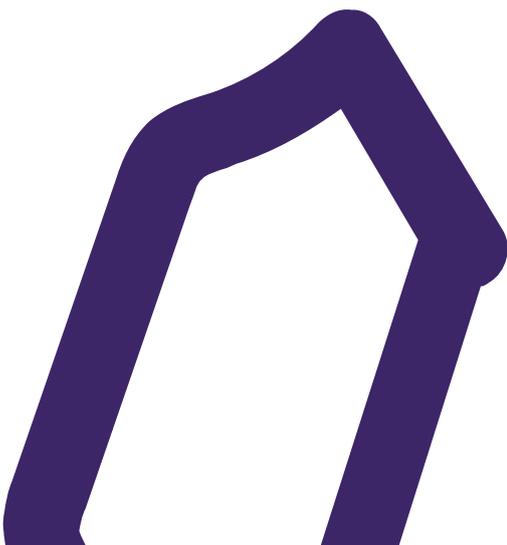
What to include in your advert

What your charity does and why this is an exciting opportunity for a trustee to contribute

- ▶ What skills and/or experience you're looking for and why.
- ▶ Any groups you particularly encourage applications from.
- ▶ What a trustee does.
- ▶ What the time commitment is.
- ▶ Any benefits (e.g. out of pocket expenses, training, etc.).
- ▶ Explicitly outlining benefits of relevance to under-represented groups (e.g. childcare expenses).
- ▶ Where the meetings are held.
- ▶ How to find out more information.
- ▶ How to apply.
- ▶ Closing (and interview) dates.

Is your advert:

- ▶ Exciting and motivating about your charity's work and the difference a trustee can make?
- ▶ Clear about the skills, knowledge and experience applicants need and why?
- ▶ Inclusive (i.e. will a broad range of people with the skills, knowledge and experience you need be drawn to the advert and likely to respond)?
- ▶ Explicit about the support you offer to trustees (e.g. expenses, training, etc.)?



Encouraging applications

We are frequently asked how charities can encourage applications from candidates who are under represented on their boards, or candidates without prior experience, without appearing tokenistic or making a faux pas.

Here are some examples of sample wording to guide you:

“Previous board/trustee experience is not necessary and we welcome applications from all ages and backgrounds.”

This is a generic example of how to encourage applications from a wide range of people. This small step can be the thing that encourages someone to apply and emphasises that you are open to applicants from different backgrounds.

“It is not necessary to have previous board committee experience as training will be provided. This position would therefore suit an individual taking their first steps to develop wider board level and governance experience.” Sense about Science.

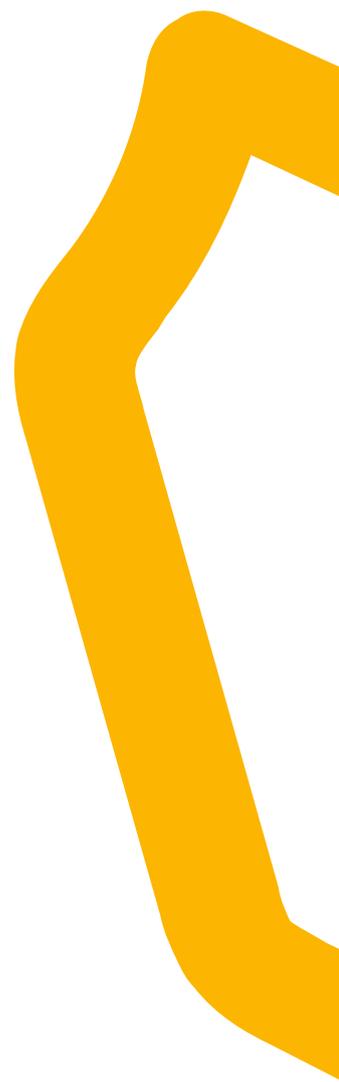
This is an example of how you can encourage first-time trustees, while also demonstrating some of the things they will gain from the opportunity.

“We particularly welcome applications from [women, people of colour, under 30s, people with lived experience of homelessness....] as we want our board to be more representative.”

This is an example of how you can positively encourage applications from groups who are currently under-represented on your board. You can adapt the wording in brackets to fit the gaps you have identified on your board. This wording doesn't come across as tokenistic – it highlights to potential applicants that you recognise under-representation and are seeking to address it.

However, the more specific you can be about who you would like to apply and why, the better, as demonstrated in this example from Flamingo Chicks.

“At Flamingo Chicks we embrace diversity. We recognise that the genre of ballet is predominantly white and are committed to making change. Our work on this is at all levels, and we feel passionate that our trustee board should be truly representative of the people it serves. We're therefore encouraging applicants from all backgrounds and (especially those) from Black, Asian and minority ethnic groups. Given the nature of our work, we are keen to add more voices with lived disability experience to the board too – helping us evolve our work with all disabilities in mind.”



ADVERTISING

What good is that brilliant advert you've developed, if potential applicants don't see it?

This happens all too often. Always prioritise your advertising plan. This step is essential to advertising where your potential trustees will see it and can require more legwork than the previous steps.

Now that you've worked out who you're looking for and produced a stellar advert that speaks directly to potential applicants, the next step is developing an advertising plan that will get your advert in front of your desired talent pool.

Advertising methods

Researching advertising platforms and suitable methods is an essential step. You can't freestyle this; work backwards from the list of what you are looking for from your new trustees. How will you reach people with those criteria?

Your existing assets

- ▶ Your website
- ▶ Your newsletter
- ▶ Your building(s)
- ▶ Your mailing lists
- ▶ Your volunteer database.



Pros:

- ▶ It would be short-sighted if you didn't use your own assets to advertise. Your stakeholders are likely to share the opportunities, even if they aren't directly eligible themselves.
- ▶ Current and previous service users or people with lived experience of the cause you work on may see this in your materials when seeking other ways to get involved. Using your assets is an excellent way of accessing lived experience.
- ▶ Having your advert on your own website is a useful way of amplifying your other recruitment methods – it's often the first place people look after they have seen your advert.

Cons:

- ▶ This can't be an isolated tool. If this is your sole method, you are dangerously close to having not advertised openly.
- ▶ Logistics and tech – if your website is irregularly updated, out-of-date adverts may stay up for months or be difficult to access.

Your existing networks

- ▶ People you know
- ▶ Organisations you know, such as other charities and voluntary organisations.

Pros:

- ▶ You would be throwing the baby out with the bath water if you didn't continue to use your networks to tell people about your trustee positions. The key thing is that you are not inviting people to join your board. Instead, you are asking for their help in getting the vacancy out there.
- ▶ Other community organisations can be an excellent way of reaching people with lived experience or from certain communities.
- ▶ You can use your existing links with other organisations to find potential trustees. For example, you might have strong links with the local authority, a university or a company and you can ask them to distribute your trustee vacancy to their staff and students.

Cons:

- ▶ This method needs to be treated with care as you are 'fishing in your own pool' and risk solely finding other people like you.



Chichester Ship Canal Trust, photography by Richard Gatley

Trustee listing websites

- ▶ [Reach Volunteering](#)
- ▶ [Do-it Trustee Finder](#)
- ▶ [Getting on Board](#)
- ▶ [CharityJob](#)
- ▶ [Goodmoves \(Scotland\)](#)
- ▶ [SCVO \(Scotland\)](#)
- ▶ [Volunteer Now \(Northern Ireland\)](#).

Pros:

- ▶ These are the best places to find lots of already aspiring trustees. These platforms are extremely helpful for reaching a larger number of applicants due to their popularity for trustee vacancies.

Cons:

- ▶ This should not be your sole method if you're seeking people from specific professions or groups.
- ▶ This will skew towards people already connected to the charity sector and/or already familiar with trusteeship.

Social media

- ▶ LinkedIn
- ▶ Facebook
- ▶ Other platforms

👍 Pros:

- ▶ Around 85% of the UK population use social media¹⁴ making it an essential tool as part of your advertising plan.
- ▶ Different platforms can help you reach different audiences in different contexts, particularly if you use multiple methods.
- ▶ You can use these media in a targeted manner. For example, many professional groupings and networks are built around a particular cause or interest (e.g. charity marketing professionals, black fundraisers or women working in campaigning).

👎 Cons:

- ▶ Not everyone is on social media, and your own social media may be skewed towards people like you.



Local resources

- ▶ Volunteer centres/councils for voluntary service
- ▶ Posters in local spaces such as hospitals, civic centres and universities
- ▶ Local Facebook groups, newsletters and e-magazines
- ▶ Local press.

Pros:

- ▶ These avenues are particularly vital if you're seeking either local potential trustees or potential trustees from a specific geographic area.
- ▶ Even if you aren't a local charity, advertising in the community where the charity is based is often a positive step.
- ▶ Infrastructure bodies – such as your local council for voluntary service, volunteer centre or membership body – are useful in many capacities. We strongly recommend getting in touch with them to see what they can offer if you haven't already.

Cons:

- ▶ If you aren't a local charity and trustees from your local area are already over-represented, local advertising cannot be your sole or primary recruitment method.
- ▶ These methods will still be generic in terms of the candidates reached.

Skills- or knowledge-based search

- ▶ Workplaces/employers/business parks
- ▶ Formal and informal business networks
- ▶ Membership bodies for certain professions
- ▶ Publications, websites, online networks for different professions
- ▶ Professional associations
- ▶ Professional bodies, some of which already advertise trustee positions, for example:
 - ▶ Institute of Chartered Accountants in England and Wales
 - ▶ The Honorary Treasurers Forum
 - ▶ PM Jobs (HR professionals)
 - ▶ Digital Trustees.

Pros:

- ▶ This is the most straightforward method of accessing candidates with professional specialties.
- ▶ Using a variety of methods to reach employers can leave you with a strong candidate pool. This could be local or national. You can target physical offices – ask HR or admin to share your vacancies with their mailing lists as you're offering a volunteering and professional development opportunity to their employees.
- ▶ You are highly likely to reach people who have not considered trusteeship before.

Cons:

- ▶ Some associations may skew towards professionals who are more advanced in their careers or those who have the time available to join a network. This may pose both class and age limitations.
- ▶ There are no guarantees that you will access candidates that diversify your board in areas other than their professional specialty.

Targeting under-represented groups

Specific listing websites/platforms that cater for protected characteristics in trusteeship include:

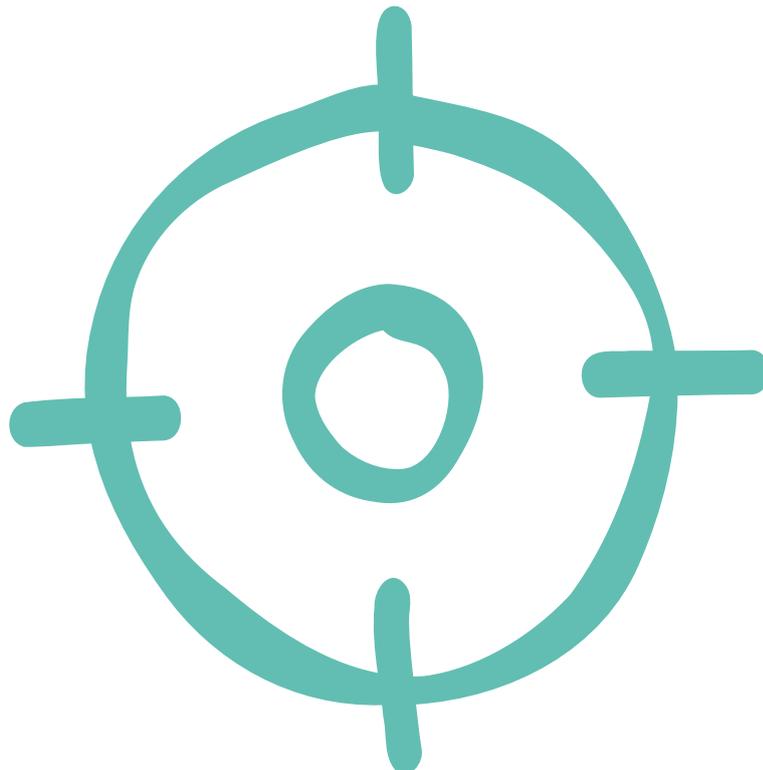
- ▶ [Young Trustees Movement](#)
- ▶ [Women on Boards](#)
- ▶ [Action for Trustee Racial Diversity \(ATRD also sells a database of Black and Asian network organisations\)](#)
- ▶ [#QueerTrustees](#).

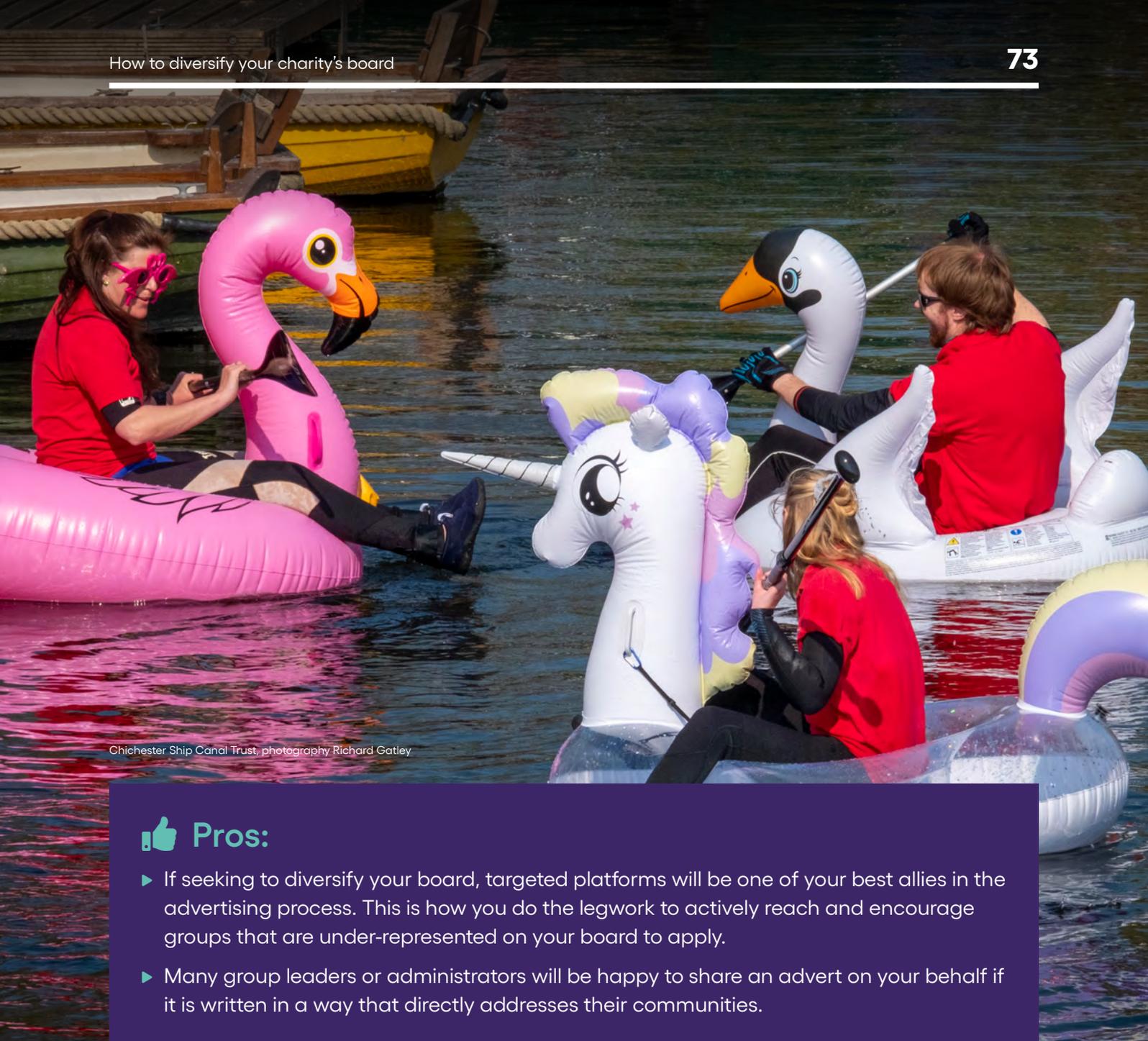
Professional/work-focused membership bodies built around protected characteristics include:

- ▶ [Black Fundraisers UK](#)
- ▶ [Women in Banking & Finance](#)
- ▶ [BYP Network](#)
- ▶ [Black Solicitors Network](#)
- ▶ [International Association of Young Lawyers \(AIJA\)](#).

There are also many informal social networks for protected characteristics, such as Women and non-binary people in campaigns and POC in campaigns.

The above are just some examples of the thousands of specialised networks which exist. These networks tend not to have special arrangements to advertise trustee positions. Indeed, the administrators may not know about trusteeship.





Chichester Ship Canal Trust, photography Richard Gatley

👍 Pros:

- ▶ If seeking to diversify your board, targeted platforms will be one of your best allies in the advertising process. This is how you do the legwork to actively reach and encourage groups that are under-represented on your board to apply.
- ▶ Many group leaders or administrators will be happy to share an advert on your behalf if it is written in a way that directly addresses their communities.

💡 Considerations:

- ▶ If you don't share the protected characteristic the group is built around, contact the administrators instead of joining the group to post your advert – this is an easy mistake to make, and often done with good intentions, but may cross a boundary.
- ▶ Ensure your advert isn't tokenistic before sharing externally, but particularly if sharing with the people who comprise said diversity. This may damage your credibility with the exact candidate group you would like to apply.

There are also paid recruitment platforms that specifically target under-represented groups, though none of them (other than those mentioned at the top of this section) are specific to trustee recruitment.

SHORTLISTING



When you're faced with real people's applications at the shortlisting stage is unfortunately when we often see all the bias you valiantly worked to leave out of the advert coming back into the mix. It's vital not to leave these considerations as an afterthought.

We recommend you do the following before you even start advertising:

- ▶ **Decide who is going to be involved in shortlisting** – Factor in diversity wherever possible. Even if your board isn't yet diverse, you can have external appointees on the nominations panel (and we highly recommend paying them for their contribution). Be mindful of conflicts of interest; staff might be involved but should not take decisions since, in effect, they're recruiting their own boss. Make sure trustees are aligned on board diversity before the shortlisting stage.
- ▶ **Make sure you are clear on the criteria you are assessing against** – You should have decided these at the start of the process and they should be clearly reflected in the advert. This isn't the time to bring in new requirements. If in doubt, refer to the advert and base your shortlisting criteria on what can be reasonably deduced from the advert.
- ▶ **Ensure that the criteria don't disadvantage the groups you are trying to attract** – This can be as simple as perceiving someone to have an edge because their given example occurred on a trustee board or in a prestigious context, when another candidate's answer was just as positive but in an outside context. Seemingly minor decisions and perceptions will disadvantage the very applicants you're trying to reach. Make sure you aren't recruiting for unspoken criteria.
- ▶ **Be aware of unconscious bias and take steps to mitigate it** – While anonymous applications can help, they aren't a magic bullet. We can still show bias due to resonating with an applicant's educational institution, their awards or professional titles (e.g. MBE or QC) or being impressed by the seniority of the roles they've held. It's important that members of the nominations panel challenge each other about their assumptions.

- ▶ **Have a framework and stick to it** – Set scores (e.g. out of 5) for how closely applicants match each competency you are looking for. Shortlist separately, then come together to moderate.
- ▶ **Be actively open to difference** – Avoid recruiting for fit or in your own image by keeping this principle in mind. As an additional scored shortlisting criterion, we recommend adding: 'Will this candidate bring something useful or relevant we don't currently have to the board?'

"IMPOSTER SYNDROME IS NOT ALL IN OUR HEADS. IT'S ABOUT WHAT OTHERS THINK WE ARE CAPABLE OF OR NOT."



INTERVIEWING



Remember that a successful trustee interview will require a balance of clarity, structure and flexibility.

You want applicants to be in the best position to reflect their ability, knowledge, experience and ways of working.

The foundations of inclusive interviewing are:

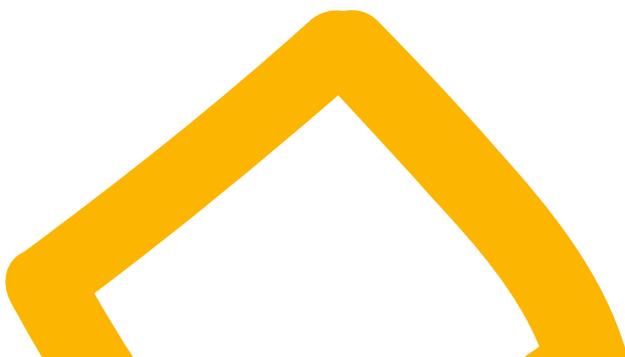
- ▶ **Consistency, consistency, consistency** – Consistency is key to fairness. Use the same set of questions for all applicants – you can delve deeper if you need to, but you want to give candidates equal opportunities to shine.
- ▶ **Ask thoughtful purposeful questions** – Every question and discussion prompt is an opportunity to assess whether a candidate is suitable to serve on your board, and whether your board is suitable for the candidate. Shape your questions on this basis.
- ▶ **Give applicants space to shine** – Keep an open mind and have a question inviting applicants to share any information they feel they haven't covered or which may demonstrate their suitability for the role. It could be that your questions didn't provide an opportunity for them to describe their most relevant examples.
- ▶ **Don't test things that can be learned later on** – For example, the trustee role or the intricacies of charity governance responsibilities. It's more important to test applicants' appetite for learning.
- ▶ **Make it a two-way interview** – Give applicants time to ask questions. You should treat an interview as a chance for both the charity and the applicant to decide whether they will be a useful and committed trustee for your organisation.
- ▶ **Remember accessibility** – Always ask if there are any adaptations, adjustments or support needs the candidate requires for them to participate fully in the interview. These are legally known as reasonable adjustments if in relation to disability, but you can use other terms.
- ▶ **Describe the interview process and stick to it** – Tell applicants how the interview will be structured, how long it will last and who will be there. At the interview, tell them what the next stages are. You might think about providing interview questions in advance or you might let applicants know what sort of questions to expect.

- ▶ **Consider panel diversity** – Even if your board or staff team isn't diverse, you can have external appointees (e.g. stakeholders, consultants, service users) and preferably should pay them for their time.
- ▶ **Remember that interviews can be scary** – How will you put your applicants at ease? People who haven't interviewed to be a trustee before, and who see in front of them people who they perceive as being different from themselves, could feel particularly intimidated.
- ▶ **Reject applicants thoughtfully** – You are unlikely to be able to appoint all the applicants. Make this clear right from the start of the process. Explain that you are looking for the best match with what the board has identified that the charity needs. When you reject applicants, remember that this might be the first time that they have applied to be a trustee. You want to leave them thinking that it was a fair process, that they could apply to be a trustee elsewhere and that your charity is fantastic!

"IT WAS A GOOD EXPERIENCE. I WAS MADE TO FEEL WELCOME. IT WAS A MUTUAL FACT-FINDING EXERCISE, WHICH I THINK THE BEST INTERVIEWS ARE."

"VERY INFORMAL, MORE OF JUST A CHAT. IT WAS OK BUT I WOULD REALLY HAVE PREFERRED AN INTERVIEW!"

"[THE INTERVIEW] WAS REALLY GOOD. I HAD AN OPPORTUNITY TO MEET ALL THE TRUSTEES AND THERE WERE MIXED QUESTIONS ABOUT MY SKILLS/VALUES AND WHY I CARED ABOUT THE CHARITY."



INDUCTION: BEST PRACTICE IN ONBOARDING



Keep in mind that a good induction does not happen overnight. In fact, it can take up to 12–18 months for new trustees to get fully up to speed, whether or not they're first-time trustees.

Remember that in a given year, there are likely to be a maximum of six full board meetings. Were you fully briefed on your paid job six meetings into it? It's worth keeping this in mind in trustee onboarding.

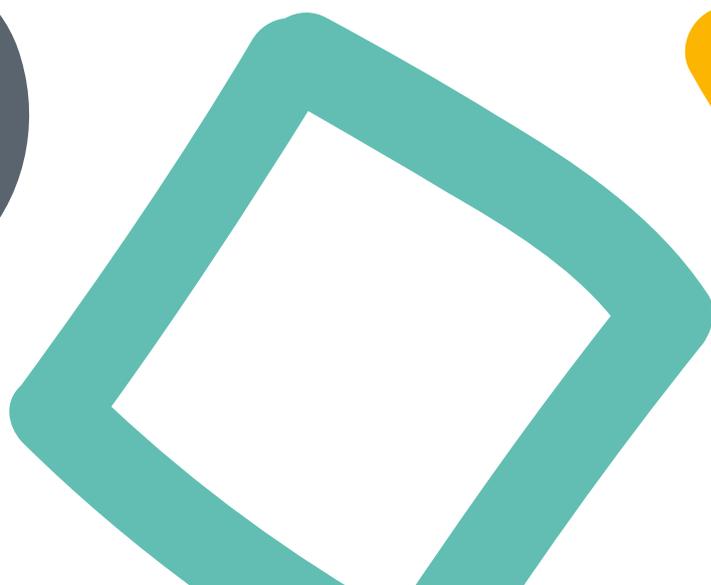
Here are some top induction tips:

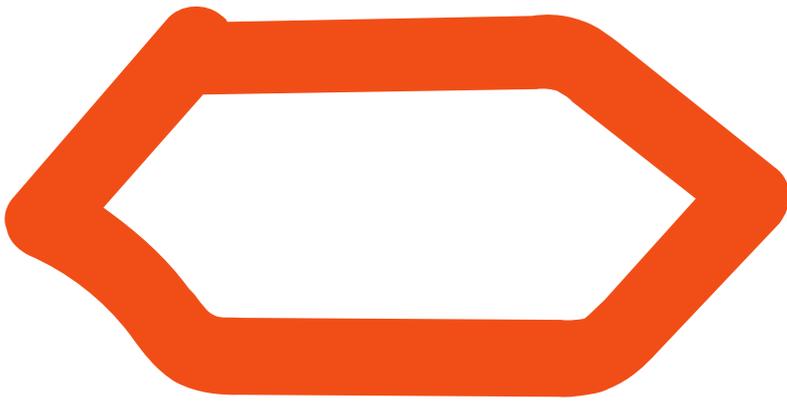
- ▶ **Recruit multiple trustees at once** – We highly recommend recruiting more than one trustee at once. It's less work for your organisation to onboard multiple people as a cohort than one individual at a time. For the new trustee, they'll be less isolated if there are others with them. Isolation is a key contributor to poor trustee retention. People are also more likely to speak up if there are others who are their peers as new trustees.
- ▶ **Use a buddy system** – Pairing new joiners with current trustees who are willing to offer 1:1 support is a great way to demystify the role. This enables new trustees to ask any questions they may feel 'silly' about raising in a full board meeting.
- ▶ **Provide training** – By training, we mean both internal and external training, and formal courses as well as meetings, visiting services and being coached by others. Remember that this shouldn't be limited to your new trustees; we often find that current trustees were inducted through either a baptism of fire or learning on the go – when they, too, would have benefited from training. While knowledge is cemented through on-board experience, you want to set your trustees up to succeed and serve your charity effectively. Training could include trustees' legal responsibilities (including governance and finance) and topics such as diversity, inclusion, disability awareness and anti-racism. Many charities will train their trustees specifically in areas related to their service users or cause, such as environmentalism, substance use or domestic violence.¹⁵

¹⁵ Getting on Board offers [free trustee induction webinars](#), which you can use to supplement your organisation-specific induction.



- ▶ **Ask people what they need** – It's helpful to offer options, rather than expecting people to arrive with a list of requests. Ask them if they have any specific development needs they're already aware of and take these into account. For at least a few months after their appointment, keep asking your new trustees whether they need any further support or training. Ask them for feedback on how meetings could be made more accessible.
- ▶ **Arrange time with the chair** – The chair has a key role in welcoming and onboarding trustees, particularly because they are responsible for how discussions and debates are conducted, inviting people to speak and getting to know their individual ways of working. For example, one person may only feel able to participate in a discussion if they're actively invited to speak, as they may feel anxious about interrupting more vocal board members. Another person on the same board may feel 'put on the spot' and under pressure if they're asked directly if they have anything to say. We strongly recommend that the chair should meet new trustees and find out how best to include them.
- ▶ **Meet and greet** – We strongly recommend that your new trustees have a chance to meet with the chair, other trustees, key staff and volunteers, and to experience the organisation's activities and understand its operations.
- ▶ **Review documents, with support and guidance** – Key documents to review during induction include: board roles and responsibilities; the board's code of conduct; the charity's strategy; governing documents; recent minutes; financial information; and the most recent annual report and accounts. Make sure to include glossaries of any specialist terms. Be willing to hold preparatory meetings or make time to take new members through papers and areas they are not familiar with.
- ▶ **Share your history** – Explain the organisation's history, work, current priorities or challenges, acronyms and jargon(!), key stakeholders and external environment.
- ▶ **Point new trustees in the right direction** – Signpost regulatory guidance and the Charity Governance Code, as well as the various free or low-cost resources available to support new trustees.





"[THE INDUCTION] WAS HELD IN THE MIDDLE OF THE DAY, TOOK A FEW HOURS, NO REMOTE JOINING ABILITY. I THEREFORE HAD TO TAKE ANNUAL LEAVE TO ATTEND THAT, AND IT WAS A LOT OF INFORMATION VERY QUICKLY, WITH LITTLE SPACE FOR ASKING THE 'DUMB' QUESTIONS THAT I AS A NEWER TRUSTEE MIGHT HAVE".

"THE INDUCTION DIDN'T REALLY EXIST. NOT IN A STRUCTURED WAY. I'VE HAD TO 'LEARN ON THE JOB' QUITE A LOT. WE WERE INVITED TO OBSERVE A BOARD AND DID HAVE ONE-TO-ONES WITH THE CHAIR OF OUR BOARD, BUT NO TRUSTEE TRAINING WAS OFFERED."

"NO INDUCTION WAS GIVEN, BUT A HANDOUT CONTAINING LOTS OF INFORMATION WAS. I WOULD HAVE LOVED A MORE INTERACTIVE INTRODUCTION AS I FELT A BIT LOST AT THE START."

"THE INDUCTION PROCESS WAS MANAGED BY THE DIRECTOR AND THIS WAS EXTREMELY WELL HANDLED. A TOUR OF THE SITE, DISCUSSIONS ABOUT FUTURE DIRECTION, STRENGTHS, WEAKNESSES AND WHAT I COULD HELP BRING WERE ALL COVERED. MY ONLY SUGGESTION MAY HAVE BEEN A MENTOR/ BUDDY ROLE WITHIN THE TRUSTEES THEMSELVES TO SUPPORT THOSE INITIAL, QUITE INTIMIDATING, FIRST MEETINGS."

HOW TO WORK WITH A RECRUITMENT AGENCY

Firstly, know that this guide is designed to give your small to medium-sized charity the tools to recruit trustees and diversify your board by yourself.

We are by no means suggesting that it is essential to use the help of recruitment professionals. However, if you would like to work with a recruitment firm to support your trustee search, here are a few ways you can make the most of their help:

- ▶ **Do the work beforehand** – Bringing in agency support still means that you need to do the work beforehand to figure out what you need, why and how you'll make the most of the trustees they recruit for you. Recruiters can help source talent, but they can't work miracles. This means doing a board audit; identifying where there are gaps and which groups are under-represented; and communicating how this relates to your charity's work.
- ▶ **Make sure all board members are on the same page about diversity** – Before you start the recruitment process, get the whole board on board with why board diversity matters. An agency can support your efforts to diversify your board, and have a key role in sourcing the talent you need to meet your aims as a charity, but they can't do the work of changing board culture or people's minds. Nothing stunts a recruitment process like a disjointed vision. Recruitment agencies report that it is common for organisations to say they want diversity, but then end up appointing the same type of person they already have. One agency described this as "being seduced by a higher-profile candidate".
- ▶ **Have a clear brief** – In order for an agency to bring you the candidates you seek, you need a clear brief. Don't give them a miscellaneous 'diversity' in your brief; specify which forms of diversity. The agency can't determine your brief for you. Moreover, the entire process will be disadvantaged if the brief has been agreed on with one person on the board, but the shortlisting panel is working to different assessment criteria.
- ▶ **Be explicit about what you are looking for** – For example, if you're open to first-time trustees, explicitly state this. Otherwise, an agency might conclude that you're seeking what other clients have previously asked for.

- ▶ **Be realistic about resourcing** – This is particularly relevant if you're looking to diversify your board while also seeking very specialised professional skill sets. You might need to advertise on additional platforms or the agency might need to spend more time on the search, which could cost more. You'll also need to make yourself available for shortlisting and interviewing – any delay might lose you applicants.
- ▶ **Ask about the agency's experience** – If diversity is part of the brief, ask about the agency's track record for making boards more representative. Try to get real examples and case studies. It can also be worth checking the agency's own record on diversity and representation.

"CLIENTS NEED TO BE OPEN TO RECOGNISING THAT AN IDEAL DIVERSE CANDIDATE MAY BE VERY DIFFERENT TO THEIR EXISTING IDEA OF AN IDEAL CANDIDATE."



THE PITFALLS OF TOKENISATION

We've lost count of how many aspiring, current and former trustees have spoken of their experience of being recruited to diversify a board – with apparent good intentions – only to find that their 'diversity' is the only thing the board was interested in.

It can feel as though you're there to be seen but not heard. This can easily happen as defensive actions in anticipation of, or following, bad PR. It goes back to the charity's reasons for diversifying the board. Preferably, your desire to diversify your board comes from a positive vision of wanting your board to be more representative of and accountable to the communities your charity inhabits or serves.

People don't always want to speak for their communities, so if that's what you're looking for, you need to be specific about that when you recruit. Also, the gains that you're getting from bringing diverse lived experience to the board may be holistic rather than specific. People may choose to speak to their lived experience without specifically highlighting that they are doing so.

Don't ask people to lead on diversity, equity and inclusion unless they offer to, or you have specifically recruited them under that remit or for their professional expertise in that area.

Your new trustees will know – very quickly – if they've been recruited for the wrong reasons. It will show in board dynamics and whether their views are elicited and valued. That can be a damaging experience and deter them from future trusteeship – it also poses a risk to your charity.

By investigating your own assumptions and working to become more inclusive and equitable, your board will be working to ensure that trustees are treated fairly, inclusively and equitably, placing them in the best position to contribute to your charity. The last thing you want is for your new board members to become ghost trustees, who are seen but not heard, and quickly become absent in all aspects but the physical. Recruiting and considering diversity for the right reasons is vital to building a board on which your new trustees can be fully equal participants. That is in the best interests of your charity.



Freedom Studios

"I LEFT A TRUSTEE-STYLE ROLE BECAUSE I FELT INTIMIDATED AROUND LOTS OF WHITE PEOPLE. YOUR VOICE IS UNDERMINED AND YOU FEEL LIKE A MINORITY. IF YOU ASK TOO MANY QUESTIONS YOU FEEL LIKE YOU ARE BEING DEMANDING. IT ALSO JUST FELT LIKE A TICK-BOX EXERCISE. I WAS LIKE A SILENT MEMBER OF THE BOARD. THERE WERE A LOT OF POWER DYNAMICS DUE TO RACE ISSUES."

"IT WAS HARD AT FIRST. I DIDN'T HAVE ANY CLEAR SKILLS TO OFFER, DIDN'T KNOW WHAT A TRUSTEE WAS AND WAS CONCERNED AND THEN CONFIRMED TO BE A DIVERSITY HIRE - A CONDITION OF FUNDING AT THE CHARITY. I CAME REALLY CLOSE TO QUITTING BUT DECIDED, * IT, IF I'M GOING TO BE IN THIS POSITION I'LL BE VOCAL AND USE THIS SEAT TO CHAMPION CHANGE."**



The Winch

SECTION 3

WHAT TO DO ONCE YOUR NEW TRUSTEES ARE ON THE BOARD

INCLUSIVE GOVERNANCE

At this stage, you've decided that your board needs to be more diverse, you've advertised and your new trustees are joining.

Don't stop at the final hurdle! What's recruitment without retention? Facilitating inclusive governance is vital, particularly if you want to keep and get the best out of your wonderful new trustees.

Inclusion is essential to making sure that your new trustees can contribute fully. If you appoint trustees without any consideration for changes and adaptations you might need to make to your board practices, your new trustees may not be able to contribute as much as you and they hoped they would. Ultimately, they may not stay.

In law, trustees have equal responsibility. You will therefore want to ensure that trustees have equal agency.

Much of inclusion is about being thoughtful, open to challenge, considerate of the structural barriers different groups face and willing to learn. Inclusion is also necessary for innovation, discussion and participation.



Good governance dictates that all board members should feel able to:

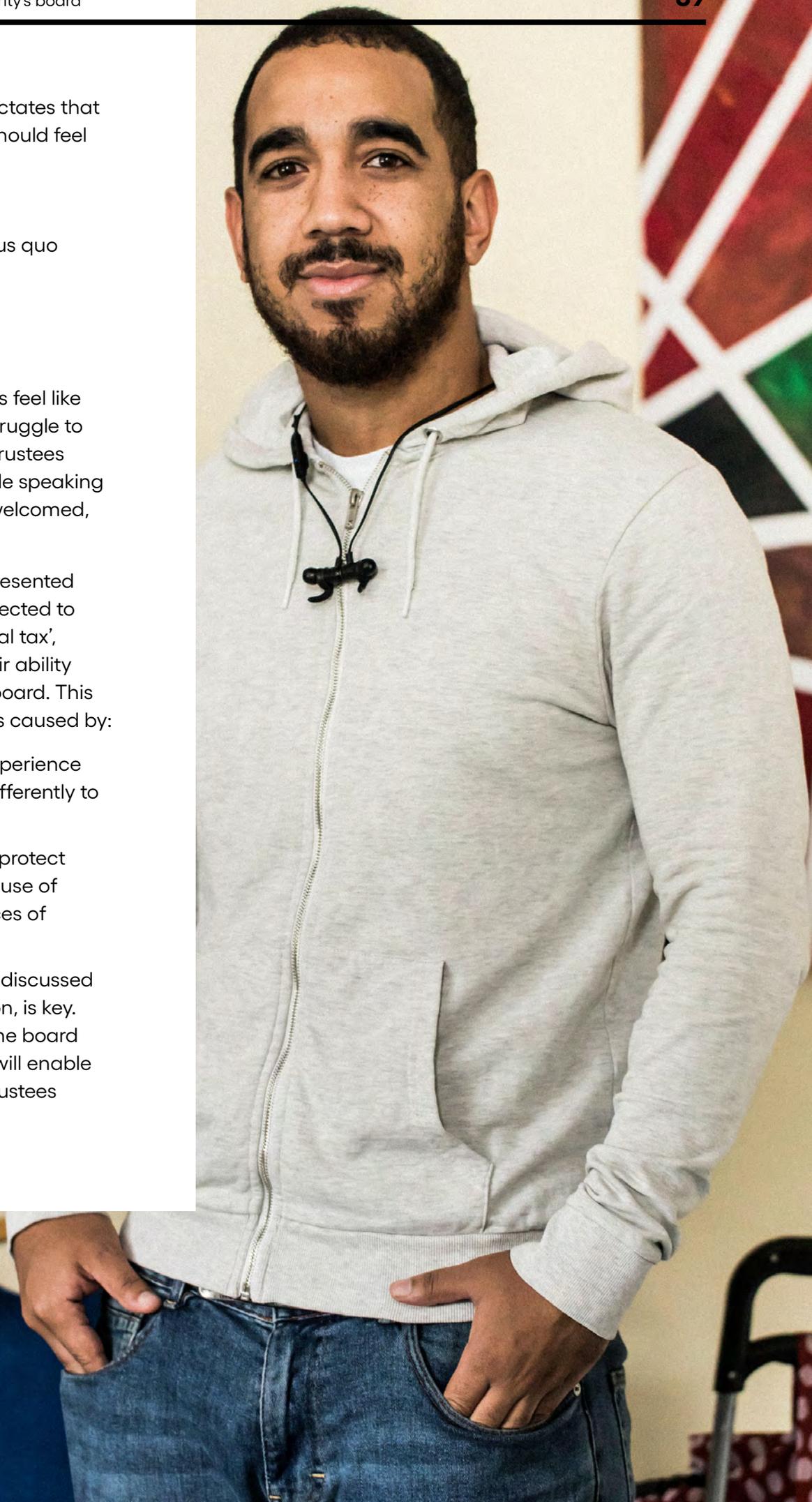
- ▶ ask questions
- ▶ challenge the status quo
- ▶ speak up
- ▶ express ideas
- ▶ expose problems.

But if board members feel like 'outsiders' they will struggle to contribute. In short, trustees won't feel comfortable speaking up if they don't feel welcomed, valued or listened to.

Moreover, under-represented trustees may be subjected to heightened 'emotional tax', which can affect their ability to contribute to the board. This extra set of barriers is caused by:

- ▶ The heightened experience of being treated differently to your peers.
- ▶ Being on guard to protect against bias (because of previous experiences of discrimination).

The induction stage, discussed in the previous section, is key. This section covers the board environment, which will enable under-represented trustees to thrive.



SUNEET SHARMA



“Meeting other trustees before your first board meeting pays dividends

The chair held a social event about a month before my first board meeting as part of my induction. I met the three other new trustees beforehand and we went through some introductory slides about the charity and played some ‘getting to know you’ games. After the social we were added to the trustees WhatsApp group. This paid dividends at the board meeting as I already had a feel for the social dynamics.

Do your research before your first board meeting

I would advise you to prepare well. Put yourself forward and take ownership of the trustee role. I would have struggled without working through the papers carefully. I’d also done my own research, so I knew what position my fellow trustees held and what they did on the board.

The sheer volume of work in a single meeting took me by surprise

I had prepared thoroughly by having a chat with the chair beforehand and I’d read the minutes, so I knew the structure. But it was a very full-on meeting, covering a broad range of subjects, from finance to social media, to media reports and compliance.

I learn a lot from my fellow trustees

One of them is from a project management background, so I’m learning about how to break down something into its constituent parts and then present them to the board. I’m also learning from the chair how to manage different personalities, and how to make the most of a board meeting and summarise key headlines with useful context that is not necessarily in the papers.”

Suneet Sharma is a trustee of It Gets Better UK and Co-Chair of the SEGA LGBTQ+ Employee Network. As a mental health advocate, he focuses on eradicating stigma and is an ambassador of video games mental health charity Safe In Our World. He is also a legal executive.

“IT WAS NERVE-WRACKING AT FIRST BUT I’M EASING INTO IT. IT WAS IMPORTANT TO REALISE THAT, DESPITE BEING THE YOUNGEST PERSON ON THE BOARD, I HAD EXPERIENCE AND KNOWLEDGE TO OFFER. THE BOARD HAVE BEEN SUPPORTIVE AND ENCOURAGING AND I AM LEARNING A LOT FROM THEM, AS WELL. THE DIRECTOR AND STAFF HAVE BEEN WONDERFULLY GENEROUS WITH THEIR TIME TO HELP ME GET UP TO SPEED TO ALLOW ME TO ADVOCATE AND SUPPORT THEM.”



The role of bias in inclusion on boards

While some of the barriers to inclusion on boards can be partially alleviated by revised practices, policies or training, addressing adverse group dynamics will require culture change at board level. As trustees, our biases have a role in how we navigate board dynamics. We all have views, approaches, 'gut' reactions, sympathies and notions informed by our experiences, backgrounds and traits. This extends to the biases that affect our interactions, perceptions, interpretations and, of course, our decisions on boards.

Research shows that people generally hold biases that favour those like themselves. This is demonstrated in most recruitment processes. For example, trustees often unconsciously recruit in their own image. These biases also play out in board dynamics. For example, research has indicated that listeners often think women have spent more time talking in a discussion, even when they have spoken less. Other biases might include thinking that younger trustees know about digital technology (and older people don't); or that trustees with 'posh' accents have greater skill or knowledge than those with a regional accent.

However, it's important to remember that inherent bias does not mean that we should be complacent and accepting of our biases just because they're unconscious. Instead, acceptance that we all have biases should drive us to make a conscious effort to address not only our biases but their effects. This means critically reflecting on power dynamics – even, or especially, if they're in our favour – and being willing to take action to rebalance them. It also extends to welcoming varied perspectives, so that groupthink can be more easily avoided; committing to working inclusively; and being receptive to challenge, as well as being willing to act on feedback.

Signs that your board might not be inclusive

Here are some signs that might indicate that your board is not inclusive:

- ▶ Certain members of the board aren't taken seriously.
- ▶ Under-represented trustees are regularly closed down or their view is not elicited.
- ▶ Some trustees are asked to comment only for their (assumed) demographic, or on diversity issues, but not on other matters.
- ▶ One or two trustees do most of the talking.
- ▶ Some board members don't really know why they're there or what they can contribute (and their fellow trustees don't know either).
- ▶ Some trustees are left out of formal and informal discussions, and strategic decisions are often taken outside the boardroom by a subset of trustees.
- ▶ Under-represented trustees are scrutinised more than other trustees, both at application stage and while on the board.
- ▶ A series of under-represented trustees haven't stayed long – you haven't asked them why and you haven't made any changes since.

"BECAUSE I WAS YOUNG, I WAS NOT RESPECTED (DESPITE BEING ONE OF THE ONLY TRUSTEES THAT ACTUALLY READ THE MEETING MATERIALS AND ALWAYS ATTENDED, AND WAS WELL QUALIFIED). I WOULDN'T ADVISE OTHERS TO TAKE ON ROLES UNLESS THERE HAS BEEN TRAINING FOR THE BOARD ON WHY THEY GENUINELY WANT DIVERSITY BEFORE EXPOSING PEOPLE TO THAT ENVIRONMENT."

"[I HAVE BEEN] PIGEON-HOLED AS A GUARDIAN FOR MY DEMOGRAPHIC."

Don't put unfair expectations on your new trustees

We outline some useful practical steps you can take as a board in the next section, but you should also think about whether the expectations that you are placing on your new trustees are fair.

Don't put the burden of being a changemaker solely on new trustees: even if they have been recruited to bring a fresh or different perspective, the responsibility to drive change should be collective.

It can be unhelpful to put trustees in boxes: 'the young trustee', 'the lived experience trustee'. It is useful to explore this as a board and agree on an approach to board inclusion.

The whole board needs to be ready to do things differently and able to articulate why they are diversifying.

"I USED TO HAVE INNER DIALOGUE IN MY HEAD - MONOLOGUE - I SHOULD HAVE SAID SOMETHING - MOMENT PASSED - NOT ADDING MUCH VALUE - TOOK A WHILE TO PICK UP THE CONFIDENCE TO SAY IT - BUT TOOK A WHILE AND I HAVE DECADES OF EXPERIENCE AND IF I AM STRUGGLING BASED ON THE COLOUR OF MY SKIN WHAT CHANCE HAS SOMEONE ELSE GOT."

"AS SOON AS AN ASIAN OR BLACK PERSON PUTS OUT THEIR VIEWS, THEY ARE OPENLY AND SUBTLY IGNORED."

"SOMETIMES IT HAS BEEN TRICKY AS THE 'STRANGER' ON THE COMMITTEE, AS PEOPLE ASSUME I HAVE COMMON KNOWLEDGE I DON'T."

INCLUSIVE BOARD **LEADERSHIP FOR** **INDIVIDUAL TRUSTEES**

It is useful for individual trustees to think about how they can contribute to an inclusive environment, as well as for the whole board to reflect on it together.

It can be tempting to think it's the chair's job to create a board culture that will equip under represented trustees to thrive. Chairs do have a critical role, but every trustee should consider:

- ▶ Are you listening more than you speak (remember the adage '1 mouth, 2 ears')?
- ▶ Are you making an active effort to welcome and get to know new trustees, and to avoid over-reliance on shared history and links with long-standing trustees?
- ▶ Do you go into a meeting curious to hear what your fellow trustees think and willing to change your mind?
- ▶ Are you championing difference, actively seeking out different perspectives and looking for things that the board may not have fully considered?
- ▶ Do you model humility, being honest when you don't know something, being happy to ask questions when you're not sure and demonstrating an active interest in learning?
- ▶ During discussions, are you aware of who has and has not spoken?
- ▶ Are you checking that you're not the one to speak more than others or that you're not the one who always speaks first?
- ▶ Are you comfortable being challenged, recognising the value of challenge to effective governance?



Education and Employers



- ▶ Are you approachable, kind and empathetic to your fellow trustees? Remember that newer trustees are likely to feel intimidated or uncertain in their first meetings – a warm welcome, a chat, an email or an offer of a meeting are likely to go a long way in making them feel engaged.
- ▶ Are you actively trying to get to know your fellow trustees? What do they do in the rest of their lives? Why did they join the board? Are they getting on OK?
- ▶ Finally, are you self-aware and conscious of board dynamics and what is going on around you?

Many readers will note that the above checklist can contribute to effective governance more generally.

PRACTICAL STEPS BOARDS CAN TAKE TOWARDS INCLUSIVE GOVERNANCE

Here are some of the practical steps you can take to make your board of trustees more inclusive:

- ▶ **Establish a trustees' code of conduct** – Agree with your fellow trustees how you will behave and operate. Make sure the code includes diversity, inclusion and anti discrimination.
- ▶ **Set a meeting schedule which suits everyone** – Set dates and times for meetings once all board members have been appointed, rather than based on custom and practice. Consider time, frequency and location based on members' needs and don't arrange meetings at very short notice.
- ▶ **Organise your meeting calendar** – Consider school holidays and non-Christian holidays when scheduling meetings.
- ▶ **Consider personal circumstances** – Create a safe space where people can be open about their needs and challenges. Beyond listening, act on any pain points raised, explore options to resolve them and allow yourself to be guided by the people affected wherever possible.
- ▶ **Circulate meeting papers** – Think about the format they are provided in and whether they work for everyone. For example, do some trustees need larger print if hard copies are provided? Send meeting papers out well in advance.
- ▶ **Get to know each other appropriately** – Social events are important, but make sure that you are not excluding non-drinkers, trustees with less money or those with caring responsibilities. If the same trustees regularly can't make your socials, go back to the drawing board.
- ▶ **Develop a positive culture around expenses** – Trustees are encouraged to claim expenses (such as travel and childcare costs). Trustees should not be left out of pocket for having contributed to their community or a cause they care about. Some trustees may feel embarrassed to claim expenses if a positive tone hasn't been set on the topic, and if the process isn't simple and discreet. It helps to emphasise early on that the board expects trustees to submit expense claims. Explain how to do this, so that the burden of asking isn't on the individual new trustees.

- ▶ **Arrange trustee training and development** – Both new trustees and not-so-new trustees should have access to ongoing training and development. Although some training might be particularly valued by those who haven't been trustees before, all trustees should value access to regular learning and development opportunities, which will help them undertake their roles more effectively.
See our resources section for a list of external providers of trustee training.
- ▶ **Provide specific training on inclusive board practices** – Getting on Board can help! You can commission an inclusive board practices session for your board.
- ▶ **Stick to term limits** – Use them pro-actively in accordance with your governing document, to refresh your board membership regularly. Conduct exit interviews when trustees leave and use (paid, if possible) external interviewees if you suspect that trustees are leaving because they felt excluded.
- ▶ **Make practical adaptations** – What changes can you make in terms of the meeting papers, meeting format, location and communication that will support your new trustees to contribute? Have you asked them?

"THERE SHOULD BE APPROPRIATE TRAINING FOR EVERYBODY – UNDERSTANDING THAT IT'S NOT ABOUT THERE BEING A DEFICIT AMONGST MINORITISED TRUSTEES JUST THAT ALL TRUSTEES NEED TO BE HIGHLY COMPETENT."

"MOVE BEYOND WELCOMING AND UNDERSTAND THE THINGS THEY NEED. ARE THERE ENOUGH BREAKS BUILT INTO THE MEETING (AN ISSUE IF YOU HAVE ADHD/BACK PROBLEMS), IS THE DOCUMENTATION AVAILABLE IN DIFFERENT FORMATS, IN PLAIN ENGLISH. IS THE ROOM ACCESSIBLE?"



TRUSTEE TRUTHS



There are billions of boys and girls who are young, gifted and black, and that's a fact

'O brave new world that has such people in it!' My hope is that, by 2030, the make-up of charity trustees will recall those wide-eyed words of Shakespeare's Miranda in *The Tempest*. I hope that charity trustees will reflect more brightly the people they support. I hope that those of us who are not white, not male, not older, not university educated and have 'lived experience', will feel supremely confident when applying to become a charity trustee because they will believe that they're competing on a level playing field. They will aspire to enter a boardroom which is continually welcoming, inclusive and respectful of their views and perspectives.

To introduce a slightly more contemporary reference – at least for me! – the wonderful Nina Simone sang [in] *Young, Gifted and Black* 'in the whole world you know, there are billions of boys and girls who are young, gifted and black, and that's a fact.' From Action for Trustee Racial Diversity's perspective, we're not asking for billions of young, gifted and black (and brown) trustees, but only for charities to recruit 10,000 of them to at the very least to bridge the startling 40% under representation gap from 8% to 14%. That's only 5,000 organisations – 3% of charities in England and Wales – recruiting two trustees each – an eminently achievable mission for the sector and for charities who are genuinely committed to equity, diversity and inclusion.

Three things must change. Firstly, a stop to informal recruitment by charities. Secondly, charities identifying and engaging more positively and inclusively with diverse sources and networks of potential trustees. Thirdly, and crucially, charities paying much more than lip service to ensuring an inclusive and welcoming environment within their boardrooms and organisations once Black and Asian trustees are recruited. Commitment to those three key steps is – in my opinion – the surest path to a more diverse, a more representative and a more responsive charity sector.



Malcolm John

Founder, Action for Trustee Racial Diversity

FURTHER RESOURCES, TOOLS AND TRAININGS

Useful organisations and groups

#CharitySoWhite – A campaign to support the charity sector to take the lead on tackling and rooting out racism.

#QueerTrustees – A campaign to promote LGBTQ+ inclusive boards.

ACEVO (Association of Chief Executives of Voluntary Organisations) – A membership organisation that supports CEOs of charities and social enterprises in England and Wales.

ACOSVO (Association of Chief Officers of Scottish Voluntary Organisations) – A membership body that supports voluntary sector leaders in Scotland.

Action for Trustee Racial Diversity – A campaign which supports charities to take practical steps to increase the racial diversity of their boards.

Association of Chairs – A membership organisation for chairs of not-for-profit organisations.

Beyond Suffrage – A trustee training programme to increase the number of women from Black, Asian and minoritised ethnic communities serving at board level. Run by Social Practice (ENT).

Charity Finance Group – A membership body supporting financial knowledge in charities.

Chartered Governance Institute UK & Ireland – The membership body for governance professionals.

Cranfield Trust – Pro bono services and free resources for charities.

DSC (Directory of Social Change) – Training and publications on all aspects of leading and running a charity or voluntary organisation.

FSI (Foundation for Social Improvement) – Supports small charities with free advice and heavily subsidised training in strategy, governance, fundraising and impact.

Getting on Board – That's us! We can help you in all sorts of ways, including free training and guidance for your trustees.

Honorary Treasurers Forum – Supporting charity treasurers.

Inspiring Scotland – Support for organisations working on social exclusion in Scotland.

IVAR – Research into the voluntary sector.

NAVCA (National Association for Voluntary and Community Action) – A membership body for local sector support and development organisations (also known as local infrastructure) in England.

NCVO (National Council for Voluntary Organisations) – A membership organisation for charities, social enterprises, community groups and organisations in England.

NICVA (Northern Ireland Council for Voluntary Action) – A membership body for the voluntary and community sector in Northern Ireland.

Reach Volunteering – Professional volunteer recruitment platform, with guidance and resources on trustee recruitment.

SCVO (Scottish Council for Voluntary Organisations) – The national membership body for the voluntary sector in Scotland.

WCVA (Wales Council for Voluntary Action) – The national membership body for voluntary organisations in Wales.

Young Trustees Movement – A campaign to increase the number of young people on charity boards.

Charity regulators

Charity Commission for England and Wales

Scottish Charity Regulator (OSCR)

Charity Commission for Northern Ireland

Many charities have other regulators, too, such as Companies House, the Care Quality Commission and OFSTED.

Further reading and resources

The inclusion imperative for boards – Deloitte Insights

Home Truths: Undoing racism and delivering real diversity in the charity sector – ACEVO

How to improve diversity and inclusion on trustee boards – NPC

How to build an inclusive board culture – Diligent Insights

Taken on Trust: awareness and effectiveness of charity trustees in England and Wales – Charity Commission for England and Wales

A breath of fresh air: young people on trustee boards – Charity Commission for England and Wales

Young trustees guide: Developing the next generation of charity leaders – CAF and Leon Ward

Charity Governance Code for England and Wales – Good Governance Steering Group

Scottish Governance Code – Scotland's Third Sector Governance Forum

Code of good governance for Northern Ireland – NICVA

Full Colour Inclusive Leadership Framework – Full Colour

Charities: inclusive governance – Inclusive Boards

Missed Expertise: mapping the experiences of first-time foundation trustees – Eli Manderson Evans and the 2027 Partnership

Board cultures guide: a guide to support charities with young women of colour on board – Beyond Suffrage

Trustee recruitment cycle – Reach Volunteering

How to become a charity trustee – Getting on Board

From here to diversity: a practical guide for recruiting Black and Asian charity trustees – Action for Trustee Racial Diversity

Lived experience on nonprofit boards – Bayes Business School

The looming crisis in charity trustee recruitment: how poor trustee recruitment practices threaten to damage the effectiveness of UK charities – Getting on Board

Trustee diversity: who is applying and who is appointed? – Reach Volunteering

Diversity, equity, and inclusion in the nonprofit boardroom – Cause Strategy Partners

Essential guide to recruiting a chair, trustees and chief executive – ACEVO and Green Park

Board shadowing webinar: what it is, how it benefits charities and getting involved – Prospectus/The Smallwood Trust

Guided by young voices: how to include young people on your board and in your decision making processes – Roundhouse

Getting young people onto your trustee board – Young Trustees Movement and #iwill

A BIT ABOUT GETTING ON BOARD

As a trustee recruitment and diversity charity, it's our guiding belief that board diversity is key to effective decision-making, better delivery of a charity's services and the broader goal of creating a more equitable society.

We seek to achieve this through our work both with aspiring trustees, particularly those who are currently under-represented on trustee boards, and charitable organisations.

We provide an ever-increasing range of webinars, events and educational opportunities, many of which we're able to deliver for free.

Our flagship free webinar [What is a trustee and how do I become one?](#) takes place monthly and is a solid, practical grounding for aspiring trustees in the first steps to take towards trusteeship. If you want to encourage applicants who haven't been trustees before, this is the ideal place to direct them to find out about trusteeship.

Among our webinars for charitable organisations and trustees, you'll find [How to diversify your board](#), which is a complement to this guide, and [Help! We need new trustees](#), which includes general advice on how to establish a sustainable trustee recruitment strategy.

Our six-week [programmes](#) offer more in-depth support, workshops and live support for both aspiring trustees and charity leaders.

THE LAST WORD

This guide has been written by the amazing Sophia Moreau, but with input from a really wide range of people, including our sponsors, our advisory groups, the Getting on Board team, our colleagues in other organisations who inspire us with their work on board diversity, our wider wonderful and supportive network, and the individuals who have spoken to us about their experiences of recruiting or of being recruited as trustees. All of these people have given their expertise and experiences generously because they share a vision of a charity sector whose boards are more diverse, as befit a modern, resilient, effective and relevant charity sector.

We took a very specific stance that this guide should be practical and motivating, not finger-wagging, and that it shouldn't be full of technical terms relating to diversity.¹⁶ There is of course space for alternative approaches to improving trustee diversity, the range of which we wholeheartedly welcome. The trustee diversity challenge is of such a scale that no single organisation will make a difference alone.

We appeal to all of you: what can you do in your piece of the charity world to ensure that the charity sector's boards purposefully develop to reflect more closely the mind-blowing, wonderful diversity of our communities?

Penny Wilson and Fiona McAuslan

Getting on Board, 2022



16. If you would like to read more about diversity terms, here are two helpful glossaries: [UKRI glossary of EDI terms](#) and [Language by the Social Justice Collective](#).



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