



Can we be trusted?

What the official guidance doesn't tell you about being an effective charity trustee

Paul Lindsell & Joanna Gibbon

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Paul Lindsell is a company founder, a Managing Director and runs a number of industry forums. He has been involved in trustee and charity advisory positions since his early thirties across a range of social, cultural and educational issues.

Formerly a journalist, **Joanna Gibbon** has worked as a Director in business for the last twenty years. She served with the Red Cross during the war in former-Yugoslavia in the 1990s, has acted as interim CEO for charities, and has been a trustee and advisor to a variety of charitable causes.

So, you're a trustee... what does that really mean?

What does it mean to be the trustee of a charity? What are you expected to do? How much commitment is needed? What is your role? How much influence do you have? How do you interact with your fellow trustees? These are all questions that everyone taking on the role of trustee should understand. Yet recent scandals around charity trustees¹, their duties and their required behaviours have shone a spotlight on how poorly understood the role is.

Sure, there is guidance available to help charity trustees fulfil their roles – from the government, from the Charities Commission and from other bodies. In so far as it goes, that guidance is fine and is certainly essential reading for anyone serving as a trustee or intending to be one. If you have not read the Charity Commission's 5-minute guides² to being a trustee we recommend you do so as soon as possible.

However, having spent half a lifetime serving on charity boards, we know the available literature does not cover many points of advice which are critically useful for those generously giving up their time to be a trustee. Many people serving as trustees have never read even the official guidance. And in any case, while it gives very good principles for trustees to follow, it does not deal with some of the more challenging day-to-day realities of being an effective trustee.

The organisation Charity Leaders (charityleaders.org.uk) summarises the point well: "Almost all of the support available for trustees focuses on compliance and then defines roles and responsibilities of a trustee. But since when did understanding a job description ever guarantee excellent performance? ...We also believe that the 'unofficial role' of the trustee must include both top-down and bottom-up support to staff."³

In other words, there isn't enough guidance available that reflects 'on-the-ground' realities that trustees typically face. Yet it is often those insights that enable trustee boards to make the most impact in helping their charity to achieve its aims and increase the benefits that it is bringing to its intended beneficiaries.

In this short, easily digestible booklet, we have put together our collective experience of some of the most challenging aspects of being a charity trustee, scotching a number of misconceptions about the role and offering some simple pointers to success.

Don't be unnerved by the scenarios we paint. Your work as a trustee is desperately needed in our society. But do heed some of the pitfalls and danger signs that often undermine a trustee's efforts.

We hope that you find this short piece of value in your work as a trustee.

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Being a trustee is its own reward. It feels good to 'give back'... to do something for others. But there is always the threat of complacency. In my view the first question we should always ask ourselves every time we make a decision as a board and every time we consider making an important public statement is not whether we are doing a good thing, but whether this is the most good we can do. Allied to this is the question of what will the long term consequences of our actions be, particularly with respect to future generations. Trustees are there to take the long view.

— **Rene Olivieri**, Chair, The National Trust

What does the existing guidance say?

Official advisory publications for trustees focus mainly on the principles of trusteeship and the role's legal duties. They are important documents, especially those issued by the Charity Commission. Clearly our experience as trustees has told us that there are a number of issues not covered in this existing literature. Nevertheless, it offers several good starting points. Most importantly, to frame the various sections of this publication, the official literature tells us what a trustee is, and what the role is not. Some key points leap out.

First, we should all be absolutely, completely and unequivocally clear - it is the trustees **who are in charge** of the charity, not its executive (CEO, managers and staff).

The Charity Commission publishes a concise document entitled, *The essential trustee: what you need to know, what you need to do*.⁴ It clearly states, "Trustees have independent control over, and legal responsibility for, a charity's management and administration." To make it absolutely indisputable who is in charge (the trustees, not the executive) it says to trustees, "You must... do what you and your co-trustees (and no one else) decide will best enable the charity to carry out its purposes".

Naturally, it is important for the charity's CEO and management to get on well with the board of trustees and share a common vision. But the board of trustees set the agenda for the CEO and not vice versa. We will come back to this point later.

The second major point to leap out of the official literature concerns the skills and knowledge that trustees bring to the charity. Typically, these might be operational, financial, marketing, creative, merchandising, fundraising, and so on. The best boards are those where truly expert trustees put all their various skills together to guide staff activities, because rarely can a charity afford to employ expensive, highly experienced people in all these roles. The Charity Commission's guidance notes that trustee boards must, "Use reasonable care and skill, making use of your skills and experience and taking appropriate advice when necessary." Again, more of this later.

Finally, it is a myth that trustees should always remain (or be kept!) aloof from the day-to-day and not involve themselves in the charity's operations. The Charity Commission clearly states, "Trustees might be told

that they should not interfere in day-to-day operations. You should allow staff and volunteers to carry out any functions that have been delegated to them. But you and your co-trustees must be able to ensure that delegated authority is being properly exercised, through appropriate monitoring and reporting procedures (and, where appropriate and possible, independent checking)".

Another third-party advisory document succinctly describes the trustees' balance between strategic guidance and hands-on involvement: "Trustees don't usually do the day-to-day running of the charity. They delegate this to the staff, led by the Chief Executive. Instead, they play the role of a 'critical friend' to the Chief Executive by giving support and by challenging – in a supportive way – to help them manage effectively. However, in smaller charities with few staff, **trustees may take hands-on roles too**." This is one of the most important pieces of myth-busting for existing or would-be trustees – if you have skills which aren't covered (or aren't well delivered) among the charity's staff, your time and expertise need to be directly deployed to serve the 'best interests' of the organisation!

“ Under section 177 of the Charities Act 2011, the legal definition of a charity trustee is 'the persons having the general control and management of the administration of a charity.'⁵

— Chartered Governance Institute

“ It is axiomatic that charity trustees, in common with all other trustees, are concerned to further the purposes of the trust of which they have accepted the office of trustee. That is their duty. To enable them the better to discharge that duty, trustees have powers vested in them. Those powers must be exercised for the purpose for which they have been given: to further the purposes of the trust.⁶

— The Charity Commission

Big question #1

Should your charity be going it alone?

If you are an existing trustee, or a potential one, you are duty bound to consider whether the charity is best placed to deliver its objectives on its own, or whether it should co-operate – or even merge – with one or more other organisations who are active in its field of good works. Overlapping charitable work can mean charities tripping over one another through too closely related audiences and objectives. A consortium or merged approach might deliver more (success) for less (cost) in terms of 'public good' (i.e. the outputs that all charities must legally deliver).

So, is your charity in this situation? We have seen examples of this phenomenon in a number of charitable areas: early years intervention with struggling children and families; support for the homeless; cancer charities; and more. There are a host of other (very worthy) charitable activities where such overlap is happening – to the extent that the Charities Aid Foundation even publishes literature to guide collaboration effort and help "avoid duplication"⁷. If there are several organisations all doing the same or similar things – especially within a given locality – then the process is inefficient and is effectively wasting donors' funds by not co-operating (or even merging). Fundraising itself may be severely hampered by disorganised, overlapping and ineffective campaigns.

The notion of charities better achieving their 'public good' objectives through a consortium approach or a merger with another overlapping organisation is in no way frowned on. Certainly, some charity founders may resist such moves on minor technical differences – mainly because they consciously or unconsciously regard the charity they founded as 'their baby'. Yet it is obvious to all but the myopic and blinkered that it can never be a good use of donors' money to have several organisations all doing (broadly) the same thing.

As such, charity trustees actually have a duty to regularly review whether their charity still has a remit to deliver 'public good', and if so, whether it could deliver against that remit better, or more efficiently, if it were to combine or collaborate with another similar organisation. As Charity Digital magazine puts it, "Charities are increasingly looking to form partnerships and mergers with other organisations in the sector. Often this is to be more efficient, with two or more charities sharing similar priorities and offering complementary services to better support beneficiaries."⁸

The Charity Commission even publishes guidance on the subject, entitled ***Making mergers work: helping you succeed***.⁹ Research from Eastside Primetimers has shown that the number of mergers in the charity sector is at its highest for five years, driven by growth in the number

of smaller voluntary organisations being taken over.¹⁰ And the National Council for Voluntary Organisations (NCVO) also publishes guidance for trustees evaluating the possibility of a merger. That guidance notes, "When deciding to merge, your main consideration should be whether merging will improve outcomes for beneficiaries by helping an organisation better achieve its aims. There has been a growing interest in merger among voluntary and community organisations... The most successful mergers are those where the parties recognise there is a strategic and organisational fit: each has something to gain from the other."¹¹

Overall, trustees need to stay aware of their need to regularly review mandate and relevance. Again, the Charity Commission summarises this neatly¹² saying, "You and your co-trustees should also review the charity's objects from time to time and make sure that they are still appropriate, relevant and up to date. Circumstances change over time and this could affect whether... the charity's beneficiary group still exists, and is still a 'sufficient section' of the public... [and whether] there may be better ways of meeting the need for which the charity was set up."

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Boards need to do a regular and thorough skills audit adjusting the skills needed on the board as the priorities and needs of the charity change. Trustees should have a specific role based on the expertise that they have gained in the commercial or public sector. Amateur opinions are simply not a worthwhile substitute.

Trustees should think of themselves as advising or mentoring staff and occasionally ‘doing’ in their focused area of interest. This is more than just talking at board meetings; it is both reactive (being available for advice) and proactive (advising the executive team on how to achieve their goals). At meetings, other trustees need to respect this expert input, only questioning when they have a knowledgeable reason to do so, keeping board meetings professional and constructive. Being a trustee is a serious, sometimes time-consuming responsibility but a rewarding one.

— **Kirsten Suenson-Taylor**, Trustee, Compton Verney Fund

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A Board of Trustees should be capable of delivering four broad functions

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- (1) Policy-setting, focused on what you are seeking to achieve, i.e. the organisation’s mission and purpose;

 - (2) Strategic Analysis, on positioning, resourcing, risk management and the external environment;

 - (3) Management Oversight, which includes monitoring operational and financial KPI’s whilst also being ready to offer advice and support; and

 - (4) Governance and Accountability, covering reporting, compliance and due process.
-

Most Trustees are stronger in some areas than others and a good Trustee Board will recognise this by appointing Trustees with contrasting strengths. Some may have greater experience of scrutinising financial data whilst others will have a better grasp of the opportunities and challenges in the external environment; some will be happy to cast a beady eye over details buried in the small print whilst others will be more focused on what the bigger picture is saying. As a Trustee, therefore, don’t be overly concerned if you feel less expert in some areas; but do be very concerned if the Board of Trustees collectively lacks the necessary breadth of experience to carry out all its key functions.

— **James Lindsay**, Trustee, The Common Good Foundation

Big question #2

What have you been appointed for?

Why is a particular trustee being appointed? Precisely what skills and experience do they bring to the charity? Are they precisely relevant to the charity's needs (and those of its staff)? And how are they going to be expected to apply and deploy those skills?

In our view and experience, every trustee should be appointed with a clear, specific role. Often this doesn't happen. Sometimes charity founders appoint their friends and acquaintances as trustees – especially at the beginning of a charity's life - with little thought as to what each will specifically contribute. And if trustees are friends, it becomes very difficult to hold objective, unbiased and robust internal debate about how the charity should be run and directed. In our opinion, such trustee appointments should be avoided unless you have a clear role which would stand scrutiny, whether or not you are already acquainted with the board or the executive.

On another related point, charities often think it clever to appoint 'prominent' people to their boards, thinking that somehow this will osmotically attract success. In reality, this is quite illogical, often prompted by muddle-headed sycophancy, which frequently wastes a valuable trustee position, and rarely produces useful results. If a celebrated person, senior civil servant or a captain of industry is under consideration as a trustee, then make sure it is very clear what the person is

being asked to do and whether they can really make the time commitment to do it. Deeds, not words, make the difference in a successful trustee. Indeed, as the Charity Commission advises, "The trustees consider the best methods of attracting a diverse range of candidates with the skills the charity needs. This may include advertising in the local and/or specialist press and using trustee brokerage services."¹³

In our personal experiences, each of us has been brought on board because we have a deep understanding of certain subjects: marketing, communications, journalism, finance, commercial management and proposition development. Both of us also understand intimately how small to medium-sized (SME) organisations work (the vast majority of charities are SMEs). That allows us to quickly analyse what a charity needs in terms of (for instance) marketing; what techniques are appropriate and which will be an utter waste for valuable donors' funds; what staff skills are needed in-house and which should be bought in when needed; how to achieve the most with the least; and so on. Because we work (commercially) with some very large companies, we're up to date with all the latest techniques and technology. Yet we also work with smaller firms who have to be nimble and careful with their spending. And, of course, our own companies are

Limited appointment periods of trustees are now best practice. This is laid out in the Charity Governance Code¹⁴ – guidance which has been endorsed by the Charity Commission¹⁵ and which was last refreshed in 2020. The Code specifically notes that:

Trustees are appointed for an agreed length of time, subject to any applicable constitutional or statutory provisions relating to election and re-election. If a trustee has served for more than nine years, their reappointment is:

.....
subject to a particularly rigorous review and takes into account the need for progressive refreshing of the board
.....

explained in the trustees' annual report.

successful SMEs in their own right.

This illustrates the rationale that should be applied to each trustee appointment. First, the charity's board needs to identify the trustee roles needed – maybe finance, or sales, law, retail, fundraising, healthcare, social services, cultural management, HR/training, strategic business management, or a host of other possibilities. Then, when potential trustees from these backgrounds are being assessed, the charity needs to be absolutely precise about what is expected from them. How much time will be needed? How often and where do the trustees meet? How long is the average meeting? What other occasions are the trustees needed for? What needs to be achieved? By when? Which member of staff

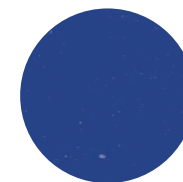
needs to be mentored? What resources will be available? What are the financial or performance targets?

Over and over again, we have seen fellow trustees appointed without a clear role or mandate. And the result is almost always a disaster and a disappointment. Avoid getting people appointed as trustees simply because they are: 'a powerful person in our field'; or 'very influential locally'; or 'well-connected'. None of these are viable or precise. And more than likely you'll just get someone who is fond of the sound of their own voice but doesn't actually **do** anything useful. If someone is brought on board to do fund-raising, then they need to be given clear targets and timings. Otherwise, how can things be clear and achievable?

Finally, if you have been appointed to do the job as trustee because of your particular skills and experience, make sure you have a clear mandate to deliver against precise targets. Make sure you are convinced that you have the resources (staff and/or budget) to deliver against target. Make sure that the relevant staff understand (and accept) that you are **their** trustee and that they must listen to your guidance and steering. And make sure that your fellow trustees understand that this is your sphere of expertise and knowledge and that they should respect and listen to your input... that's why you have been appointed!

Charity Statistics

Number of charities in England and Wales 2021-22 ¹⁶	169,029
Trustee positions 2021-22 ¹⁷	928,688
Charities negatively impacted by COVID ¹⁸	90%
Annual revenues generated 2021-22 ¹⁹	80bn+
% UK charities generating up to £10,000/annum ²⁰	44.5%
% UK charities generating £10,001 to £100,000/annum ²¹	35.5%



Big question #3

How involved do you get?

We have already established that a charity is governed and run by its trustees. Trustees 'delegate' duties to the Chief Executive and their management and operational staff. But ultimately, the trustees are in charge. The board of trustees decides what its executive staff are skilled and/or capable of doing, and it is not only legitimate but also responsible for trustees to fill skills gaps where they can – especially in small organisations. Resistance from any member of staff to the (reasonable) instructions and the will of the board of trustees is completely unacceptable.

It may seem odd to be stressing these points, yet they are often misunderstood, despite the extremely clear guidance from both the government and the Charity Commission. Far too often have we seen a charity chief executive regard the board of trustees as an irritation to be 'managed' (for which read 'ignored'). Trustees have to assert themselves, so long as their demands on the executive team are reasonable.

How involved, then, do you become as a trustee?

Well, that's a question for you to answer, define and recommend to your fellow trustees. You have been appointed because you have relevant experience and expertise. You must then be allowed to exercise that knowledge and experience. Normally, you would look at whatever function in the charity you have been appointed to 'govern'. You would analyse whether it was working well. You would look at the staff and decide whether their skills, capabilities and achievements were high-performing or sub-standard. Having done this analysis, you would recommend to your trustee board if changes need to be made, and propose those changes. Finally, you would decide (with your fellow trustees) whether all required activities could be best delivered by staff or suppliers, or whether there were functions that you could fulfil yourself (but remember you can never be remunerated). In this way, you will be professionalising the function that you have been appointed to look after. If you do spot weaknesses, this should not be imputed as deliberate or vexatious under-performance

by the staff in question. Neither may it be a negligent weakness of the line manager or chief executive. In business, we often see a phenomenon called "unconscious incompetence". In other words, people may be unwittingly under-performing – simply because they do not have the full range of skills or experience to optimally do their job. As the saying goes, "You don't know what you don't know!" So part of your solution for any problems you identify might well be persuading your fellow trustees to invest in up-skilling certain staff members. Whatever your solution, you will be expected to design a method of measuring your designated function's performance. How can you govern something unless you can see how it is performing? Answer: you can't... and not to put any form of performance measurement system and regular review in place (even if 'delegated' to a manager or to the chief executive) borders on the negligent.

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For trustees – especially in smaller charities – the line between their legal responsibility for oversight and a direct involvement with day-to-day operations can become blurred. The skills of trustees must be used in every best way possible to meet the charity’s objectives, sometimes filling the skills gap in a small operation.

There is also a necessity for a diverse board, not only with a carefully judged mixture of skills and experience, but also diversity in age and life experience. This brings different perspectives to challenge the accepted norms of a long-standing board (perhaps where there has been little change for several years). Being a trustee for a charity whose aims and ideals you support is a huge privilege and immensely rewarding. No one should be deterred from applying because of the focus on legal obligations in official guidance. But they should go into it with their eyes open. This short document – **Can we be trusted?** – is an invaluable guide to becoming an effective trustee based on the authors’ own front-line experience.

— **Charlotte Beatson**, Trustee, Homestart Oxford



Big question #4

Measuring outputs

Let's say it once again - *How can you govern something that you cannot measure?* This is the legal responsibility of each trustee on a charitable board - individually over their own particular area, and collectively across the whole organisation.

In our experience, there is too little performance and measurement culture in charities, especially smaller ones. Staff are rarely set hard targets and measured on how they meet those targets. In the business world, this would not be tolerated. Indeed, trustees themselves are rarely held to account on the extent to which they ensure any properly articulated targets are met. This is extraordinary – especially given the Charity Commission's clear guidance that trustees have a duty to ensure that “delegated authority is being properly exercised, through appropriate monitoring and reporting procedures (and, where appropriate and possible, independent checking)”.

It is almost as if people working in some charities are not subject to the normal professional standards that have to be met in every other workplace across the land. Anecdotally, we have seen a good number of cases over the last two decades where basic management disciplines are not exercised – apparently because of some muddle-headed, misunderstood notion that in a pro-bono organisation everybody has to be particularly

'nice' to one another and that highlighting any under-performance is unnecessarily confrontational and can be brushed under the carpet. 'It's not nice to question anyone, after all we're a charity,' has been heard many times.

Yet how can this ever be right? Donors have given money in good faith to be used for charitable purposes. If a commercial organisation chooses to waste money by not imposing normal professional disciplines, shareholders lose out. But there are mechanisms for those shareholders to punish the company and demand change. If an employee in a charity, however, is not properly managed, then funds given in good faith – often generous donations from people of slender means – are effectively wasted. This is ethically scandalous and an abnegation of the trustees' responsibility to (as the Charity Commission advises) “make sure the charity's assets are only used to support or carry out its purposes” and ensure the “charity is complying with the law, **well run and effective.**”

So, if you are, or are becoming, a trustee, it is critical to set up a system of performance measurement so that you can see what's going on, monitor what has been achieved, and effectively govern your 'patch', as well as reporting clearly to your fellow trustees.

Do you accept funding with conditions?

Charities may often be tempted to apply for funding from grant-giving bodies which then carry onerous conditions. Trustees should be careful about such conditions. Do they distract the charity from its main aims? Do the conditions divert staff from their main duties and targets? Is the money – however substantial – worth that distraction? Is the cost of fulfilling the conditions worth the squeeze? Please think long and hard about the value of funding options compared to the cost of fulfilling any associated conditions.



Big question #5

Managing in a crisis; avoiding a crisis

There's plenty of advice available on the internet for charities facing a crisis situation.²² After all, the COVID period greatly damaged both fundraising and service delivery for many charitable enterprises. According to one study, a majority (60%) saw a loss of income, and a third (32%) said they experienced a shortage of volunteers.²³ And all this at a time when the cost of living has risen and societal stress has grown greater – just when, ironically, some charity services are needed more than ever.

Some of this existing advice is very sound, although it tends to focus mainly on financial matters. A good example is one guide that helps judge when a financial crisis is imminent – defining a stage called the 'insolvency twilight zone'.²⁴

We strongly recommend that trustees study this recent literature as a matter of course. It offers valuable insights. However, we'd like to stress a number of

other points that may be early indicators of potential deterioration or bad management that may cause crisis situations or may accelerate the advent of a crisis – financial or otherwise.

Long before financial matters reach a critical point, charities can become seriously dis-functional.

A good starting point to spot future trouble coming down the road is to assess whether real debate and discussion is happening within a charity board, or whether a dominant chair or sub-group of trustees is driving the agenda. There's nothing wrong with trustees applying themselves with passion and vigour to their roles – indeed, it is largely to be celebrated and appreciated. On the other hand, there is everything wrong with a clique railroading their views and desires over the rest of the board.

Each trustee also has a responsibility to not sit quietly by, but to insist on full information and transparency.

We believe that every trustee should also periodically submit themselves to introspection, asking themselves the questions, 'What am I for?' and 'Am I still making a difference?' However, it is also incumbent on trustees to make sure their voice is heard by the board and is put on record. The trustee who does not speak out when they disagree with their fellows, or when they see a potential impending problem, is – quite frankly – negligent.

In a commercial company, non-executive directors who do not speak out (or insist their reasonable questions are answered and make any concerns a matter of record) leave themselves legally liable. In a charity, the same should obtain, and in extreme cases such personal liabilities are very real indeed. The Government is quite clear that "Trustees who act in breach of their legal duties can be held responsible for consequences that flow from such a breach and for any loss the charity incurs as a result."²⁵

“ With the events of recent months and years, it has become more important than ever for trustees to have access to the basic information that they need to be able to manage their charities.²⁶

— The Charity Commission



So – watch out for danger signals when you are acting as a trustee. A charity does not have to have reached financial crisis for it to be badly managed. Here are a few warning signs – although not a comprehensive list – to look out for:

- Does your chair of trustees encourage proper debate, or railroad decisions through with the support of friendly trustees?
- When you ask for additional information, is that request ignored or only given token acknowledgment with no follow-through?
- Do you receive insufficient briefing before each board meeting?
- Are trustees offering their own or their relatives'/ friends' companies as suppliers because they will be 'able to get a good price'? This often leads to improper purchasing.
- Is there really a demand for the charity's services, or has it outlived its purpose (i.e. does "the charity's beneficiary group still exist, and is still a 'sufficient section' of the public"²⁷)
- Does the charity pay expenses for CEO or management that they then pay back (this is the wrong way round!)?
- Are trustees paid any significant expenses? There should only ever be small out-of-pocket expenses (such as travel to a meeting) – anything more could be an (illegal) method of remunerating trustees (for the record, we choose never to recharge any expenses in our charitable work).
- Is the CEO and management making everything visible to trustees? Are there any surprises of this sort, either in board meetings or which come to light in other ways? Remember – it's the trustees who are in charge of the charity, not the CEO or staff.
- Does the charity's work stick faithfully to its original purposes? Any use of funds outside of the charity's mandate is probably a misuse of those funds.
- If funding streams have been withdrawn, is the charity continuing as before, or is it restructuring to responsibly manage that loss of funding (or setting short deadlines and clear, credible plans to replace the funding gap)? No charity should live beyond its means.
- Is your board a diverse range of people and skills, or a bunch of friends and acquaintances (where proper debate and objectivity is difficult to implement)?
- Are trustees appointed for their celebrity status (you want to be among people who actually do stuff, rather than simply being fond of the sound of their own voice)?

Chairs out of control – early warning signals:

- Consistently not addressing trustees' concerns about certain aspects of the charity's work e.g. marketing?
- Consistently not creating a fundraising plan, having agreed to do so by a certain date
- Suggesting that they take over the position of CEO, possibly for remuneration?
- Rarely being available to talk/frequently uncontactable?
- Always implying that something 'else' or another position is more time-consuming and therefore the charity is of secondary importance?
- Railroading issues such as whether to accept funding from a large philanthropic concern which might not be a good 'fit' for the charity?
- Announcing pre-decisions made by a small clique on the board and allowing no discussion for other members?
- Disliking any form of questioning, always perceiving it as criticism rather than valuable input?
- Deciding/hurting into a chair successor without proper board planning/discussion?
- Making decisions about a staff position, e.g. a new CEO, without allowing the board to see all the applications or going through an appropriate interview process?
- Basically seeing the board as a mechanism for getting their own way on all decisions?

Key Takeaways

These are just some of the points, gained from our decades of experience on charity boards, which should help you join a worthy cause, know that your voice and expertise is making a difference, call out poor practice, and ultimately make sure that donors' precious funds are being properly spent.

We hope that this short guide gives you some useful pointers over and above the official literature. And we'd like to leave you with a few final thoughts.

- Never hold back from speaking your mind – it's your duty to raise concerns and get them in the official minutes
- On the other hand, don't try and gainsay fellow trustees in their expert subject area(s) – respect that specialist knowledge
- Don't just be a critic – it's easy to criticise but hard to put in positive effort and action. For every criticism, try to make a positive suggestion.
- If you need to step in directly with your expertise and abilities, do so
- Do be fair (but firm) with staff who don't have your knowledge and experience – teach them if you can
- Be consensual with your board – respect majority decisions once the debate has been had
- Work as a co-ordinated team – there's nothing more powerful
- Don't tolerate people who are all talk and no action
- And relish the difference for beneficiaries that you can make as a trustee!

“

When I joined the board, I had to ask myself, why am I here? What role are the other trustees seeking me to fill. Of course, I had had useful conversations with the chair, other trustees and members of staff which helped me understand that. With time I learned what expertise the other trustees had too and what they could contribute to the group. Having that diversity brings real strength to the whole board and makes the sum greater than its parts. My experience there has fed back into my life and career; particularly understanding the strategic insights of my colleagues and how they think through opportunities and challenges differently to me.

— **Dr Felix Leach**,
Trustee, The River Learning Trust

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