

# HOW TO BECOME A CHARITY TRUSTEE: A PRACTICAL GUIDE



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# FOREWORD

**At the time of writing this guide, the world around us has shifted in ways we couldn't have imagined a few months ago.**

The impact of the coronavirus (Covid-19) and the lockdown, in both the UK and elsewhere in the world, changed how all of us go about our daily lives. It's given us fresh opportunities to reflect on how we use our time, what is important to each of us, and how our world can change dramatically overnight due to circumstances beyond our control.

Events like the killing of George Floyd in the USA, and the protests that followed, brought long-standing discussions about racism into the mainstream. Many people began to talk about racism for the first time.

Discussions about racial justice have opened up opportunities for many of us to talk about other injustices and inequalities that are part of normal life for so many in the UK and elsewhere – and which shouldn't be. There are many charity trustees who are already acutely aware of how circumstances can dictate the quality of life and opportunities available to individuals, and which have motivated so many charities to be set up. The pandemic has demonstrated, again, the strength of community during a crisis, the kindness of strangers and how little gestures can make a huge difference:

Qualities that characterise the charity sector in the UK.

It has reminded us how vulnerable, resilient and creative we can be.

It has also shown – as have other crises – the critical role charities play in standing alongside some of those most in need in our communities, in bringing people together, and in getting stuck in with the reality of people's lives. In short: in bringing hope. This is in addition to the many charities that bring culture, history and joy to people's everyday lives.

The strength of a charity's board of trustees can mean the difference between thriving or fighting for survival, particularly when tough times hit. But trustees are also incredibly ordinary people (in a wonderful, complimentary way): they are everyday heroes.

Perhaps the recent situation has prompted you to think differently about how you can use your time to make the world brighter for someone else. Perhaps you've caught the volunteering bug and want to step it up a gear or take it in a new direction. Perhaps you've been thinking about becoming a trustee for a while and just need to know where to start.

Whatever your circumstances, we hope you find this guide helpful in understanding, exploring and valuing the role of charity trustees.



Credit: Frontline

Frontline is a charity with a mission to create social change for children who do not have a safe or stable home, by developing excellent social work practice and leadership.

# AN INTRODUCTION FROM ECCLESIASTICAL



**At Ecclesiastical, we have been helping to protect not-for-profit organisations for over 130 years.**

Today we provide insurance and risk management to charities, voluntary organisations, community interest companies, social enterprises and many others.

Owned by a charity, we are committed to doing the right thing and support for charities is at the heart of what we do.

**35% of charities are concerned about a lack of trustee diversity.**

We know the importance of a well-managed charity, with a diverse board of trustees bringing together different skills, experience and

knowledge to make more informed decisions. We have seen in our research over the last few years that lack of diversity at board level is an increasing concern for charities. Our research in August 2020<sup>1</sup> showed that 35% of charities are concerned (up 6% compared to 2019) about a lack of trustee diversity. Without this diversity, charities feel they run the risk of being out of touch with current and future beneficiaries and supporters.

One of the areas where charities felt they most needed to diversify was age. Over a third felt they needed to bring younger people onto boards.<sup>2</sup> We carried out a further piece of research, surveying 500 people aged 18 to 24<sup>3</sup> to delve deeper, and found that almost two in five young people would be more encouraged to become a trustee if they knew more about the role and how to become one. Sharing this with *Getting on Board*, and knowing that a lack of understanding of trusteeship was a barrier for different groups, it was clear that guidance was needed and natural for us to support *Getting on Board* in the production of this trustee guide.

We are extremely grateful to *Getting on Board* for all that they do in this area and producing this crucial guidance, the value of which we hope will be felt for years to come.

**Angus Roy**

Charity Director

[www.ecclesiastical.com](http://www.ecclesiastical.com)

1 – YouGov research 250 senior charity leaders August 2020 (commissioned by Ecclesiastical)

2 – FWD research 200 senior charity leaders March 2019 (commissioned by Ecclesiastical)

3 – OnePoll research 500 UK adults aged 18-24 October 2019 (commissioned by Ecclesiastical)



# ABOUT GETTING ON BOARD

## At Getting on Board, we are on a mission to change the face of charity trusteeship.

We support people to volunteer as charity trustees, particularly those who are currently under-represented on trustee boards. That means helping more women, people of colour, young people, people with disabilities, LGBTQI people, and so many others, to get on board with the causes they love.

We also support charities to recruit and retain diverse trustees, and help employers connect their employees with amazing volunteer opportunities. We run events from one-off workshops all the way through to supported recruitment programmes. Examples of our services are listed below.

### Help becoming a charity trustee – for individuals

If you're passionate about a cause and want to get on board as a charity trustee, we can help. We run a range of events to help people from all walks of life get into trusteeship.

Sign up for our newsletter (<https://tinyurl.com/gonbnewsletter>) for updates and opportunities.

**Our Charity Board Leadership Programme** is a six-week, in-depth course for people who are interested in



Credit: Joyce Nicholls / Brook  
Brook is the only national charity to offer a holistic approach to improving the sexual health and wellbeing of under 25s.

becoming trustees. Taught by charity sector experts, the course takes you from curious to confident, arming you with all the knowledge, resources and confidence you need to find the right trustee role.

We are particularly passionate about seeing greater numbers of more diverse people get on board. We often have opportunities available for specific groups – such as women, people of colour, people with disabilities, and more. We share all of these in our [newsletter](#).

### Help recruiting trustees – for charities

We run programmes to help charities recruit and retain trustees from all

walks of life. From one-off events to highly supported recruitment programmes, we give charities all the resources they need to create strong, skilful, diverse trustee teams.

### Help getting your team on board – for employers, federated charities, universities and more

Becoming a trustee can boost your career, your confidence, your health and your happiness. We all want our colleagues to be as fulfilled as possible, and that's why many employers ask us to help their staff get on board. Our events, workshops and programmes do just this, and the results can be amazing.

# ABOUT THIS GUIDE

## In 2019, Getting on Board published How to Recruit Trustees for your Charity: A Practical Guide.

We've loved hearing the positive feedback about how useful and... well, practical, charities have found it. We've also been asked by the many aspiring trustees we work with where they can find a similar guide on how to become a charity trustee.

So here it is! We've taken insights from focus groups, a survey of novice trustees appointed within the past two years, case studies from a broad range of people, and the thousands of potential trustees Getting on Board works with every year.

So, this guide is based on real-life experiences and perspectives. We show you what the application process looks like; bring you a collection of hints and tips to help you decide what you may have to offer; and describe how to find a trustee role that suits you down to the ground.

As well as helping aspiring charity trustees to find great roles, we want to:



Credit: Matilda Jenkins / Brook



Credit: Adam Dickens & Jean Bizimana for Taking Pictures, Changing Lives. Taking Pictures, Changing Lives is a global team of photographers, filmmakers and writers that helps charities raise awareness and funds for their life-changing work.

- Spread the word to those who don't already know what a charity trustee is or that this is an opportunity that's open to them.
- Encourage groups that are under-represented on charity trustee boards to explore becoming a trustee, increasing diversity and representation on charity boards.
- Support you to use the skills, knowledge or experience you have to maximise the positive contribution you make to a charity as a trustee.

Although this guide is aimed at people thinking about becoming a trustee in England and Wales, much of the content is applicable in Scotland and Northern Ireland – but do check with the Office of the Scottish Charity Regulator (OSCR) ([www.oscr.org.uk](http://www.oscr.org.uk)) or with the Charity Commission for Northern Ireland ([www.charitycommissionni.org.uk](http://www.charitycommissionni.org.uk)).

This guide is available online to download for free or you can buy a hard copy via the Directory of Social Change at [www.dsc.org.uk](http://www.dsc.org.uk).



# THANK YOU!

## This guide was created with help from many people including:

- The volunteers who filled out our surveys, provided case studies and quotes, and answered our questions about their experiences of becoming a trustee.
- The volunteers who took part in our focus groups to tell us about the barriers to becoming a trustee.
- The charities who shared their photos and insights.
- Our sponsor, Ecclesiastical, whose support made this guide possible.
- Lynn Cadman, who wrote the guide, and Ettie Bailey-King who oversaw its design and marketing.
- We would also like to thank the members of our volunteer advisory group, who gave their time and expertise freely because they believe that trusteeship should be more accessible. The advisory group included the following organisations:



CIPD

Indeed

# CONTENTS

9	Part A: The role of a trustee	28	Search trustee vacancies
10	About the charity sector	30	Shortlist and conduct checks on charities
11	What are charity trustees and what do they do?	32	Apply for trustee roles
17	Part B: Prepare to apply to be a trustee	35	Prepare for interview
18	Reflect on what you're looking for from your trustee role	37	Part D: The experience of being a trustee
22	Understand what you've got to offer as a trustee	38	Be formally appointed and inducted
27	Part C: Find and apply for trustee roles	41	Keep learning and being a great trustee!



# 8 STAGES IN FINDING A TRUSTEE ROLE

There isn't a 'one size fits all' approach to becoming a trustee, and individual trustees may have been on very different journeys to get to their role.

However, we've identified eight key stages that you can follow to help explore what you're looking for and land yourself a cracking trusteeship!



Credit: Girls Friendly Society

Girls Friendly Society recruits women volunteers to run groups for girls throughout England and Wales, helping girls to see themselves as having endless potential by providing a fun and safe space for them to explore all of the possibilities.



Each of these stages is explored in more detail throughout this guide





Whether you're a young person looking for board-level leadership experience, mid-career and expanding your horizons, or approaching retirement and wanting a fresh challenge, this guide will help you step into trusteeship.

"A guide like this is important so that others realise, what I wasn't told, that this route is not just for those with degrees or business qualifications, but that there is a role at the top table for those who've graduated from the university of life."

Bushra Ahmed,  
Chair of the Small Charities  
Coalition, vice-chair at the  
Asian Resource Centre Croydon  
and trustee of the Mayor of  
Croydon's charities

"This guide is invaluable in helping you understand the skills you have to offer, so you can find the right role as a trustee. Becoming a trustee can feel like a lot of responsibility, but it's a brilliant feeling knowing you really are contributing where it's needed."

Amelia Papworth,  
Trustee, Cambridge  
Money Advice Centre

"This guide will be helpful to potential trustees in understanding the benefits of taking on this responsibility and hopefully hearing from others about their experiences will only help to further that desire to apply for roles and make that next step in becoming a trustee."

Rob Avann,  
Chief Executive,  
Open University  
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