

# 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:

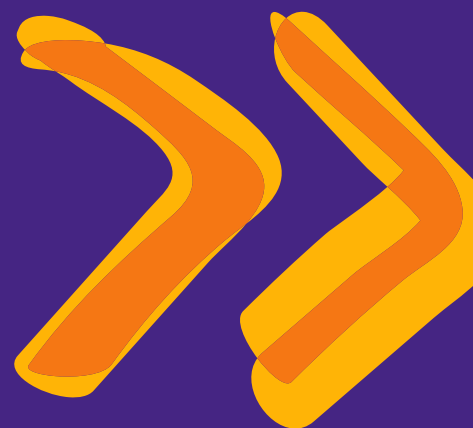


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# 8 STAGES IN FINDING A TRUSTEE ROLE

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





# PART A

# THE ROLE OF A TRUSTEE



Credit: Adamedia / Bendrigg Trust  
The Bendrigg Trust is a residential activity centre specialising in high quality courses for people with physical & learning disabilities or the disadvantaged.

# ABOUT THE CHARITY SECTOR

There are over 169,000 registered charities in England and Wales alone. But the total number of charities in the UK is closer to 400,000 if you include charities in Scotland and Northern Ireland, and those that aren't required to register. These include charities of different sizes that support a wide range of causes: from museums to foodbanks; air ambulances to community choirs; cancer research charities to faith groups; international aid agencies to conservation projects; youth clubs to care homes. Whatever your passion, there will be a charity to match it.

**Each charity out there has been set up to meet a need, to make the world a better place, to preserve something beautiful, to enrich quality of life.**

They can only do that to their best if they have a leadership with the rich mix of skills, experience and backgrounds that they need for the next stage in their journey.

## Some facts you might not know about the charity sector

→ **90%**

of UK households have used services provided by charities (even though many don't realise this)<sup>1</sup>. – if you've used certain ambulance and search and rescue services<sup>2</sup>, called an independent advice helpline, got information from sexual health groups or used community transport, the charity sector has been part of your life

→ **950k**

There are around 950,000 trustees of registered charities in England and Wales<sup>7</sup>

→ **80%**

of trustees have no staff or other volunteers to support them in their role<sup>8</sup>

→ **£83b**

Registered charities in England and Wales have a combined annual income of around £83 billion<sup>3</sup>

→ **90k**

There are an estimated 90,000 trustee vacancies<sup>9</sup>

→ **76%**

of registered charities in England and Wales have an income of less than £100,000 a year<sup>4</sup>

→ **2:1**

On average, men outnumber women on charity boards 2:1<sup>10</sup> (although there are some charities that tip the balance the other way)

→ **8.2%**

Only 8.2% of registered charities in England and Wales have an annual income of more than £500,000<sup>5</sup>

→ **0.5%**

The average age of a charity trustee is 55 to 64 and only 0.5% of trustees are aged 18 to 24, even though they make up 12% of the population<sup>11</sup>

→ **1.6%**

of registered charities in England and Wales earn 73% of the sector's income<sup>6</sup>

→ **8%**

Only 8% of trustees are people of colour, even though they represent 14% of the population<sup>12</sup>

Other minority groups are also likely to be under-represented on boards, although no one has yet measured this.

# WHAT ARE CHARITY TRUSTEES AND WHAT DO THEY DO?

**Charity trustees are the group of people with overall responsibility for a charity: they're where the buck stops.**

They are often called the board or governing body. They make key decisions about the direction the charity will take and how its purposes will be carried out. They also make sure that the charity has the resources and policies it needs to do this well and to comply with legal requirements. Charity trustees might also be called company directors, management committee members, managing trustees, or something similar.

Trustees are individually responsible for their contribution to the charity's governance – whether it complies with the law and its policies, fulfils its objectives, and stays accountable to its service users and others – and the organisation's overall effectiveness. Their opinions all have equal weight. But decisions are made collectively as a group.

- Trustees are usually unpaid volunteers, although reasonable expenses are reimbursed
- Charity boards often have 5 to 12 trustees
- Trustees are usually appointed for a term of 2 to 4 years, which might be extended
- Many charities have staff and/or volunteers who help to run the charity on a day-to-day basis, so the trustees' role is more strategic

In smaller charities, trustees:

- Might be more hands-on than in larger charities
- May volunteer to help deliver the charity's services alongside guiding the charity's long-term ambitions (and providing strategic oversight) and ensuring the charity is governed well.

**“One of the amazing personal benefits of being on a board is how it gives you opportunities and experiences which help you grow, become a better leader, learn about new issues and learn new skills. I don't think I could quantify how much I've learned and how much experience I've gained.”**

Srabani Sen, OBE, chair of trustees at ActionAid UK and at The Winch

Credit: Frontline



# CHARITY TRUSTEESHIP AT A GLANCE

## What are trustees' responsibilities?

Charity trustees have six legal duties. To:

1. Ensure a charity is carrying out its purposes for the public benefit
2. Comply with the charity's governing document and the law
3. Act in the charity's best interests
4. Manage the charity's resources responsibly
5. Act with reasonable care and skill
6. Ensure the charity is accountable

These are explained in the Charity Commission's guidance [CC3 – The Essential Trustee: What you need to know, what you need to do](#)<sup>13</sup>. This is, well, essential reading for all charity trustees.

## What about the time commitment?

Because charities are all so different, the time commitment can vary hugely – from around five hours per week to 30 hours per year. So, it's vital you find a role that fits the time you can give.

Every trustee needs to:

- Make time to prepare for and attend meetings – sometimes once a month, but often 4 to 6 times a year; meetings vary from 1 to 2 hours to a full day each, depending on the charity and how often meetings are held.
- Be ready to support the charity between meetings or with other activities; for example:
  - Considering issues over email or discussing matters over the phone with staff, other trustees, or the charity's external advisers
  - Helping organise a fundraising event or developing a fundraising strategy
  - Doing the bookkeeping for the charity
  - Acting as an ambassador for the charity
  - Sitting on a committee that looks in more detail at a specific aspect of the charity's work, such as finance, HR or safeguarding.

**So, you need to be sure that you've got the necessary time and passion to take on the role.**

**"[I dedicate] about four hours a month."**

Terri, trustee of a community food bank and kitchen

**"We have trustee meetings every two months, which take up about two hours plus an hour of reading time beforehand. I'm also on a subcommittee which meets once a month for an hour. Occasionally, I do other tasks like helping out at our fundraising events. I would say I contribute half a day to a day, each month."**

Dean, trustee of a local church

**"The role only requires two evenings a month."**

Candi, trustee of a mental health charity

**"If you're at all positive and willing, it's a serious commitment. That isn't made clear to begin with. It's always, 'This will take about 3 hours a month from you.' That's just reading the board papers – if you want to do anything else, attend the meeting, take on extra responsibilities, that eats into your life."**

Cassie, trustee

**“In work, one can sometimes feel far removed from who you really are; preparing and thinking of applying for trusteeships helps you get back to your true self.”**

Sarah



**“I’ve found being a trustee to be a thoroughly rewarding experience in so many ways. On a social level it has brought me into contact with a wide variety of interesting and inspiring people. On a professional level it has led to me having a much greater understanding of management issues such as HR and legal affairs. There is also the “feel good” factor I get from knowing that I am doing a little bit to help my community.”**

David Petrie, director of Volunteer Glasgow and a trustee of Aftermath Support

## What are the benefits of becoming a charity trustee?

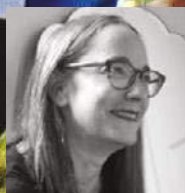
There’s a lot you can gain from becoming a trustee. For example:

- **Learning new skills** such as decision making, negotiation and influencing, thinking strategically, managing relationships and partnerships
- The benefits of an **experiential learning environment** – by learning on the job, you get access to a unique training experience while giving something back
- Opportunities to **go beyond** what you do in your day job and home life
- **Building your understanding** of the challenges and experiences that others face
- It is **good for your wellbeing** – volunteering can boost your health, help you manage stress, combat depression and grow your confidence<sup>14</sup>
- It can be a great springboard to a **non-executive directorship** (other kinds of board positions) if that’s something you want to explore further down the line.



**“I know that trusteeship can be tremendously beneficial to individuals, but a lot of people don’t realise that it’s also beneficial to the people around them, and to the companies they work for. Headhunters love people with experience being trustees. They know that you’ve navigated board meetings, complex decision-making processes and developed new skills. Why wouldn’t you seize the opportunity to gain such valuable skills and knowledge, while giving back?”**

Jeremy Leadsom, Non-Executive Director, Sussex Prisoners’ Families



**“I’ve really enjoyed getting to see [the other trustees’] skills and expertise in action. So it’s been a great way of building a personal and professional network which is really supportive on a personal and professional level, and also fun.”**

Peta Sweet, trustee of InHive

96%

of trustees say they  
learned new skills

73%

say being a trustee  
boosted their  
confidence

84%

say being a trustee  
made them happier

22%

got a promotion as a  
direct result

38%

had new leadership  
aspirations as a result

86%

say it's a good  
complement to  
professional and  
family life



# WHAT ABOUT LIABILITY?

**Personal liability refers to the costs a trustee may become individually responsible for paying, because of their role.**

When you take on the role of a charity trustee, you agree to certain duties. For example, to ensure the charity complies with laws that apply to it and has suitable policies in place; that you manage its finances responsibly; and that the charity fulfils its charitable objectives.

If the trustees fall short of these duties – for example, by inadvertently using the charity's funds for purposes that

are outside the charity's objects, or for paying a trustee when this hasn't been properly authorised – they can be held accountable. This includes repaying the charity for any loss it has suffered as a result.

Trustees of unincorporated charities (charities that aren't also companies or charitable incorporated organisations – CIOs) can also be held personally liable if the charity does not

have enough funds or other assets to meet its commitments. Therefore, checking that any charity you intend to join as a trustee is incorporated (a CIO or a company, as well as a charity), is one way of limiting your personal liability.

Incorporated charities – usually charitable companies or CIOs – have their own 'legal personality' and can enter into contracts in the name of the charity. This means that a claim made by a third party – for example, for breach of contract – would usually be made against the charity itself rather than its trustees (as long as they've complied with their legal duties).

The amount that can be paid out to meet that claim would be limited to the value of the charity's assets. If the trustees have acted properly but the charity gets into financial difficulty and needs to be wound up, the amount individual members have to contribute is usually limited to £1 or £10. This is why we refer to trustees of incorporated charities having 'limited liability'.

There is a greater risk for trustees of unincorporated charities – such as a charitable trust or charitable unincorporated association – because, technically, the charity acts in the name of its individual trustees. For example, if it takes out a loan the individual trustees are personally responsible for making sure it's repaid.

This means that, in theory, they could be personally liable for meeting those financial obligations if the charity itself does not have enough funds, even if they have acted in good faith.



Credit: Carers Worldwide

Carers Worldwide is the only organisation working exclusively with unpaid family carers in low and middle income countries. We work together to develop carer inclusive initiatives that meet carers' needs at all levels emotionally, physically, socially and economically.

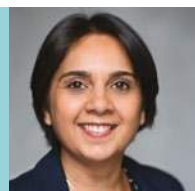
Taking appropriate advice and having good internal controls all help to minimise the likelihood of this happening. (And this can be avoided if you become a trustee of an incorporated charity.)

Whatever its legal form, a charity itself, the Charity Commission or the courts can take action against trustees who have not followed their legal duties. But don't panic: cases of trustees being held personally liable are exceedingly rare. Personal liability generally only arises if the trustees have failed to discharge their duties and this actually causes loss to the charity or improper gain to the trustee. If you follow the guidelines and act in good faith, you have nothing to worry about.

Trustees are also able to obtain trustee indemnity insurance, which in certain circumstances covers individual trustees from having to personally pay legal claims that are made against them in their role. It can usually be purchased using the charity's funds.

There are limits on what the insurance will cover – and it can actually be quite narrow – but it can provide reassurance to trustees. There is further guidance about personal liability and trustee indemnity insurance in the Charity Commission's guidance CC49: Charities and Insurance<sup>15</sup> and in the Trustee Liability Guide.<sup>16</sup>

This means that, as long as you are conscientious in your role and follow



**“The thing that put me off becoming a Trustee earlier was the financial responsibility you undertake as a Trustee. But as I've grown in age and experience, I realise that you can't be afraid of this, this is the motivator. The responsibility you take to care for the charity, its well-being, the success of it and its staff, and the impact it has, as a result, is the reward.”**

Reena O'Neill, trustee of Maths on Toast



“Understanding and applying your legal responsibilities as a charity trustee and

dealing with potential risks is the best way to avoid problems and the risk of personal liability.

Trustees can become personally liable to their charity if they cause or contribute to the charity suffering a financial loss. The law generally protects trustees who have acted honestly and reasonably. The Commission and the courts:

- can relieve trustees from liability if they have acted honestly and reasonably and have not benefited from their actions
- rarely enforce liability on an unpaid trustee who has made an honest mistake

- expect higher standards from trustees who act in a professional capacity or are paid for being trustees

Trustees who receive an unauthorised payment or benefit from their charity have a duty to repay it. The Commission can't relieve trustees from this duty.

There is no legal protection for trustees who have acted dishonestly, negligently or recklessly. However, there may be financial protection for those trustees who have made an honest mistake: from a provision in the charity's governing document, trustee indemnity insurance cover or relief from the Commission or the court.”

**Neal Green - Senior Manager – Policy, Insight and Research, Charity Commission**

Charity Commission guidance, you really shouldn't need to worry about personal liability. If something unforeseen does go wrong, the Charity Commission will usually work with trustees to help resolve the situation, recognising that in all but a very small number of cases trustees are trying to do their best for the charity.

The easiest way to check if a charity is incorporated is to search the Register of Companies at [www.companieshouse.gov.uk](http://www.companieshouse.gov.uk). If it comes back with a match, the charity will either be a company or a CIO.

## Can I even become a trustee?

In all likelihood, yes! The vast majority of people over 18 can become charity trustees (over 16 if the charity is incorporated). There are no formal qualifications or levels of experience that you have to gain before you join a charity board and you don't need to wait to be asked.

A very small number of people are automatically disqualified from being charity trustees, and the conditions that lead to disqualification are listed in the [Charity Commission's guidance](#)<sup>17</sup>; for example, people who have unspent convictions for certain offences, or who have an IVA (individual voluntary arrangement), debt relief order and/or a bankruptcy order. An individual can apply to the Charity Commission for a waiver: if this is granted, they can serve as a trustee. Trusteeship is for pretty much anyone. It's really about finding the right charity for you.

# PART B

# **PREPARE TO APPLY TO BE A TRUSTEE**





# 1. REFLECT ON WHAT YOU'RE LOOKING FOR FROM YOUR TRUSTEE ROLE



**“Becoming a trustee is the single most beneficial thing I’ve ever done. Knowing that something I’m part of is able to contribute, to transform the community, is really heartening.”**

Tom Meeks, former trustee of an academy

**“The reason I do board roles and trustee roles is because I, in common with a lot of people, want to volunteer, make contributions to my community, and improve the world we live in.”**

Srabani Sen, OBE, chair of trustees at ActionAid UK and at The Winch

## Why am I thinking about becoming a charity trustee?

There are many reasons why you might be thinking of becoming a charity trustee but research shows the most common motivation is to ‘give something back’.

Perhaps:

- You or someone in your family has been supported by a charity and you want to ‘pay it forward’ to someone else
- You feel angry about the injustices and inequalities you see in society and want to help redress the balance
- You want to see charity leaders who better reflect the people they help and your community
- You’re looking for a new interest outside work and home
- You’re looking to develop your professional or leadership skills in a different context to your day job
- You’re returning to work after a career break or looking for a career change and taking on a trustee role will help boost your confidence and/or demonstrate relevant transferable skills you have
- You’re looking towards retirement and want to do something worthwhile with the

extra time you’ll have when you give up paid employment

- You might simply be up for a new challenge.

Research shows volunteering is good for your own wellbeing and there are lots of benefits you can gain from being a trustee, as well as the reward of knowing you’ve helped others.

**For many people, there won’t necessarily be just one motivating factor, but it’s worth taking stock of what’s driving you to explore trusteeship – it will help you find a charity that’s right for you.**





## What have I got to offer?

Once you've worked out what's motivating you to become a charity trustee, you can use this to think about what you have to offer – based on your personal experience, your professional and other skills, the type of person you are and how your passion and interests have driven you to help others in the past. It can be helpful to break this down into three distinct but overlapping categories:

- Professional skills and knowledge
- Leadership qualities and experience
- Personal traits, interests and lived experience.

**Professional skills and knowledge** – these may be knowledge gained in a specific profession such as accountancy, marketing or HR. It may also include other skills and knowledge gained in a work context, such as financial planning, negotiating or customer service. You may also have gained skills and knowledge through volunteering, by fundraising for a charity or campaigning for a specific cause.

### Leadership qualities and experience

– these may come from a leadership role in your family, friendship group, community or workplace. Even if you don't see yourself as a 'leader' you are still likely to have leadership qualities that you will bring to trusteeship. Think of leadership as 'influence'. For example, if you've worked with a manager that you've found challenging, what techniques did you use to overcome that and still achieve results? Perhaps you campaigned for change at school or university? How have you influenced a situation or person's behaviour in a positive way? What did you do?

### Personal traits, interests and lived experience

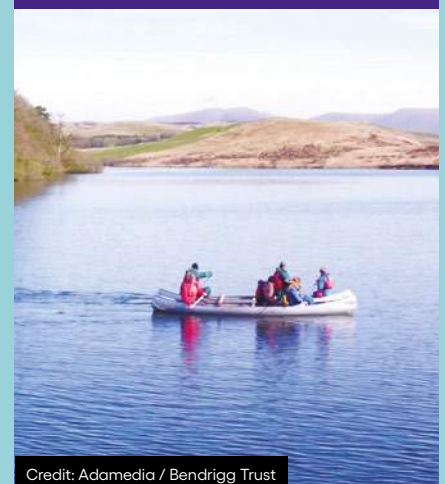
– these include both the way you work and where you get your energy, the causes or issues that interest you, and the life experiences you've gained that you can apply to trusteeship. For example, in terms of personal traits, you may be good at rolling up your sleeves and getting stuck in; inspiring others with your ideas; setting and working to clear goals and targets; being able to extract the relevant detail from lots of information; or being very compassionate and people focused.

Boards of charity trustees need a mix of all of these.



**“What's great about being a trustee is that you can bring your experience from all parts of your life. Professionally, I've worked for charities small and large, member-based, donor and social enterprise based. I've also worked for corporates, regulators, educators, founder start-ups. Personally, I'm a well-travelled, mother of two, second-generation Indian married to a Kiwi. All this brings different points of view than others on the board. I use all these experiences and passions to support, question and challenge decisions in the boardroom.”**

Reena O'Neill,  
trustee of Maths on Toast



Credit: Adamedia / Bendrigg Trust

## What's holding me back?

Having done a bit of self-reflection, it may be worth shifting your focus to whether there is anything that's holding you back from taking the plunge. From our focus groups, surveys and Getting on Board workshops, we know some of the **common misconceptions or barriers** that people face.

### I don't have anything to offer

"What skills do I have to give?" We hear this all the time, especially from young people, women, people with disabilities or people of colour. But the people who worry that they have nothing to give, often have an incredible range of skills and knowledge. Many younger people, for example, don't realise that they have valuable skills in social media or digital literacy that older board members often don't have. Whether you're 18 or 80, you have the potential to be a brilliant trustee.

**"I used to be worried that you had to be 'older' and have lots of business or boardroom experience. In reality, it just requires some passion and attention."**

George

**"Despite being the youngest person on the Board I had plenty of experience and knowledge to offer."**

Katherine

### I 'only' have lived experience

"I'm not a lawyer or an accountant, but I have lived experience of this issue." If you've been affected by the issue that your charity works on, or you have used its services in the past, you are enormously valuable! Your experience and knowledge are

essential and will help the charity do its job better.

We hear people say that they 'only' have lived experience, when this is at least as important and useful as professional experience, if not more so! Charities that are led entirely by people without experience of relevant issues – like raising children, being a care leaver, managing household debt, experiencing an assault or living with a particular medical condition – simply cannot be as effective as they could be. When charity leaders include people with lived experience, charities can be more accountable, representative and effective.

### I don't understand what being a trustee involves

Being a trustee isn't talked about widely, so most of us don't know what it is or what it entails. But being a trustee doesn't need to be complicated. You have some responsibilities (see **What are trustees' responsibilities?** p.12) and there are lots of resources to help you understand them (which we've signposted so you can read more). You don't need specialist **knowledge**, you just need commitment and curiosity.

### I won't belong on the board

"If I become a trustee, I will be surrounded by people – often older, white men – who will undermine or ignore me." In our recent focus groups with young people and people of colour, we heard from people who had had terrible experiences with racism and ageism on the board.

One person said, "As soon as an Asian or Black person puts out their views, they are openly and subtly ignored."

Another said, "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.



Credit: Flamingo Chicks

I was like a silent member of the board." Nahid\* (name changed) had the awful experience of being "concerned and then confirming [that I was] a diversity hire – a condition of funding at the charity."

These experiences are incredibly disheartening and upsetting for individuals (and shameful for the charity sector), and it's important to acknowledge the systemic issues that can make charity boards so unwelcoming. In these cases, it's not your fault. Try to address the problem with the chair or CEO. But if they won't listen, resign and move on to the next role, where hopefully your voice will be valued.

Some people are happy to be the change-makers who change boards from the inside out, but don't feel that this has to be you. As Nahid\* says: "I came really close to quitting but decided, f\*\*k it, if I'm going to be in this position, I'll be vocal and use this seat to champion change."

However, we hear from many, many trustees who have incredibly positive experiences on boards.



Credit: Frontline





**“Being a trustee is not easy. It takes time and commitment and can be very hands on, depending on how much you’re willing to do and how much support the charity needs. When thinking about becoming a trustee, it’s really important to think about the skills you can offer but also what skills you want to develop to enhance your own career.”**

Kirsty Marrins,  
trustee of CharityComms

## What am I looking for?

It’s a big world (of charities) out there, so pinning down what you’re looking for can seem daunting. If you’ve done some reflecting on why you want to become a trustee or the type of person you are, this might give you some useful pointers.

Some questions to guide your thinking might be:

- What causes or issues am I passionate about? For example, have you fundraised for a charity because of a medical condition a relative has had, joined a protest about protecting the environment, or longed to return to the performing arts you loved doing at school?
- Do I want to combine my hobbies, personal interests or work-based skills with my trustee role or am I looking for something completely separate?
- What size of charity appeals to me and fits with my motivations for becoming a trustee? Remember, the vast majority of charities are small – this is great for people who haven’t been a trustee before and want to learn the ropes. So, there are lots of brilliant places to start from!
- Do you feel more comfortable with a charity that is volunteer run or one that also has some paid staff and may therefore have more infrastructure?
- Am I being realistic about the size of charity I might join as a trustee? How do my ambitions for a trustee role match up to the skills, experience and other attributes I have to offer?
- How does the way the charity delivers its mission fit with how I like to do things and what I’m interested in? For example, does it provide services directly to individuals, campaign for change or advocate for service users, or provide training or grants for other organisations.
- What matters to me about the way the organisation is run? For example, do I like the sense of stability that having a staff team can bring; is it important to be community or volunteer led; a grassroots organisation or affiliated to a bigger organisation, or for the charity to have a wider membership connected to the cause?

What practical aspects will make or break the trustee experience for me?

- Such as:
  - The location of the charity’s activities and meetings
  - The frequency and time of day of meetings
  - Options for meeting (e.g. face to face or the occasional video conference or an overnight stay before or after the meeting)
  - Other tasks that the charity needs doing outside of meetings
- What support might I need to do my role well and is the charity able and willing to provide this?
- Am I willing to commit the time to finding the right role for me?
- Do I need to get some more experience to find the role I really want or adjust my ambitions in the short to medium term?



## 2. UNDERSTAND WHAT YOU'VE GOT TO OFFER AS A TRUSTEE

### What are charities themselves looking for?

You might see a few quite generic-looking trustee role descriptions – and might also feel that you don't match up to them.

A role description can be very helpful in setting out what a trustee does, and the charity's expectations. But role descriptions can seem quite inaccessible if you're new to the idea of trusteeship and may not give you a clear sense of what being a trustee is like at that particular charity.

In reality, there are very few truly essential criteria that an individual needs to have and many of the qualities of a good trustee can be learnt. What is more important is that the mix of people around the board table have what the charity needs.

There is also no 'perfect' or 'right type' of charity trustee. What an individual charity needs from its trustees will change over time and will also depend on who else is sat around the table from year to year. This also needs to be considered alongside what the rest of the charity's workforce can contribute, including other volunteers, staff or external advisers.

### What all trustees need

There are some common attributes that all trustees need. They are:

- **Commitment** – to serve the charity well and give the time that's needed for the role. This doesn't mean each trustee has to devote the same amount of time to the charity, but that collectively they provide what the charity needs and each person honours what they have said they will do.
- **Willingness to listen** – a key aspect of both teamwork and leadership is communication. To make good decisions and to understand what's relevant, it's important you listen to the views, experiences and evidence provided by others, including other trustees, staff, volunteers, service users and external advisers.
- **Being able to accept that you don't have all the answers** – charity trustees often have multiple options available and need to use their judgement wisely. Sometimes you won't have the knowledge about or experience of a particular issue and it's appropriate to listen to others who do or to seek outside information or advice.
- **Passion or enthusiasm for the cause** there may be times when you're reading board papers at 11pm at night because it's the only free time you've got. If you're not motivated by what the charity does, it will be hard to have the discipline and commitment that the role needs from you.

**In reality, there are very few truly essential criteria that an individual needs to have and many of the qualities of a good trustee can be learnt.**



Credit: Adam Dickens & Jean Bizimana for Taking Pictures, Changing Lives



Credit: Adamedia / Bendrigg Trust

- **Courage to hold others to account and to be held accountable yourself** – you can do this gently, kindly, in an understated way, but the buck stops with the charity's trustees. You need to be willing to hold people to what you've asked them to do and follow up if it isn't delivered. And others should expect the same from you. This applies to staff, volunteers, and external contractors, as well as service users and fellow trustees. It includes being willing to speak out, and to help others to speak out if things aren't being done well or there is behaviour that is undermining the charity's values. The role of 'critical friend' is one of the most valuable that a trustee can offer a CEO, charity manager or other senior staff.

There are many other skills and personal qualities as well as knowledge and experience that charities are looking for in charity trustees. A charity may have done a 'skills audit' – an assessment of the plans, challenges and opportunities the charity is facing, the skills it needs from trustees to guide the charity through these and where there are gaps in what existing trustees can offer.



## Professional skills or knowledge

Some of the professional skills or knowledge charities often tell us they need to meet common challenges – and examples of why they need them – include:

- Financial – for example, to understand and interrogate financial information; to inform decision making and monitor performance
- Fundraising/income generation – for example, to guide staff developing a fundraising strategy; to help organise fundraising events
- Legal – for example, to help ensure contracts properly protect the charity; to highlight when the charity needs external advice and signpost where to find it
- Property – for example, to provide advice on an office renovation; to support negotiations on a new building lease; to ensure that health and safety requirements are complied with
- Marketing and communications – for example, to provide a sounding board to staff to develop or raise awareness of the charity's brand or services
- Public relations – for example, to help senior staff learn how to engage well with the media; to help identify key reputational or other risks to the charity and how to prepare the charity to deal with them
- Digital – for example, to provide insight about how to translate existing services into a digital format; to monitor a project to change the charity's IT infrastructure
- Campaigning – for example, to advise on relevant public policy changes at local or national level; to highlight issues experienced by service users that inform a charity's advocacy role.

There may be expertise from specific sectors or sub-sectors that charities wish to draw on, too. For example, those with experience of working in or dealing with local authorities, health and social care commissioning, regulation or central government.

The skills and experience that an individual charity needs from its trustees will change over time, as the charity, its services, and the context that it's working in will evolve. There will also be specific activities – such as an office move or the launch of a new strategy – that require oversight from trustees for a concentrated period of time. If the charity has trustees who have dealt with these issues previously then this can be invaluable.

In some cases, significant professional expertise may be needed. But you may have relevant skills even if you're at an earlier stage in your career or your experience comes from a non-work-based setting.



**“Bringing a communications mindset to the board can be very important. My experience is that voluntary organisations will be more than happy to utilise your skills and experience, and they will be very grateful for your commitment.”**

David Petrie is director of Volunteer Glasgow and a trustee of Aftermath Support. His experience in marketing, communications and PR helps him as a trustee.

## Lived Experience

There is growing pressure on charity boards to have people with 'lived experience' as trustees – and rightly so! This includes people who have direct experience of the issues the charity is seeking to tackle and/or who are able to amplify the voices of charity service users. For example, you or a close relative or friend may have experienced a particular health condition, benefited from an education programme for those from lower-income backgrounds, been homeless, experienced addiction, or been a looked-after child.

The ability to apply these experiences to the charity's context and understand how they might be relevant to the charity's plans, the way decisions are made or how it operates are what we mean by 'lived expertise'.

It is obviously your choice as to how much you share with the charity about your lived experience and you shouldn't feel pressured to say more than you're comfortable with. It is also up to you whether you share details of your background during an interview, for example, and then ask for that to remain confidential rather than being disclosed to others in the charity.

If your lived experience is from supporting a relative, friend or work colleague, then take into account how much they would feel happy for you to share. Focus on your experience of seeing them dealing with an issue rather than describing the personal journey they have been on.

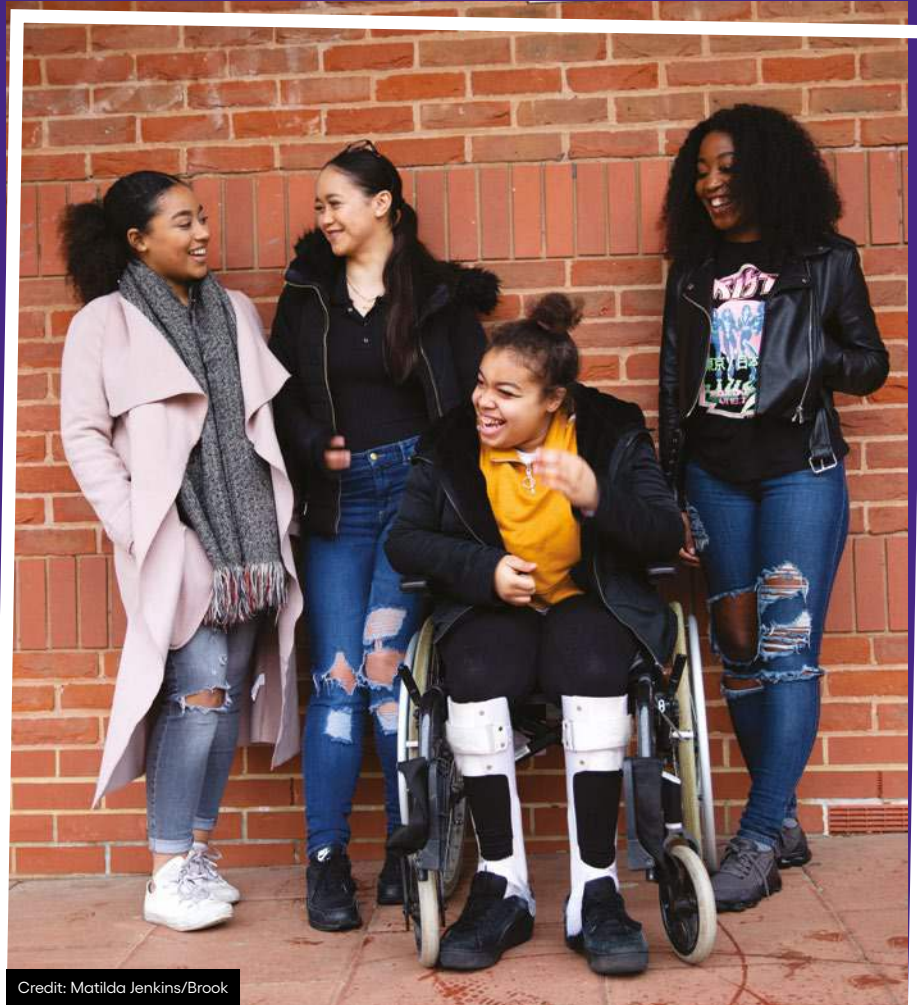
It might feel that your experiences are inconsequential or ordinary. But sometimes it's the culmination of the small and mundane things that make the difference: they can be important and life-changing – for ourselves and others.

You're not the 'poor relation' if your expertise comes from lived experience or serving your community rather than a seemingly 'high-flying' career. You may have wisdom and insight that others can only dream of. And in all likelihood, you will have skills and experience gained in a combination of work and personal situations.

### Greater diversity

The current reality is that most trustee boards are not as diverse as they should be (see section **About the charity sector**, p.10).

This lack of diversity means that 59% of charities don't feel their trustee boards reflect the communities they serve. An astonishing 86% do not feel well equipped to meet the challenges facing their charity<sup>18</sup>. The stereotypical trustee board is more likely to exhibit 'group think' and charities are missing out on the creativity and new ways of looking at things that



Credit: Matilda Jenkins/Brook



**“A broad boardroom perspective is vital, and you won't get this if everyone on your board is the same level! [Charity boards should] take a chance on younger people or people with a more everyday ground-level perspective. Diversity is about different ways of thinking or mind-sets, not just the colour of their skin.”**

Reena O'Neill,  
trustee of Maths on Toast

come from having a broader range of backgrounds, characteristics and experiences around the table.

That's why we wrote this guide. We want to encourage all members of our society to think about becoming a trustee. And if you decide that becoming is a trustee is for you, we want to give you the tools to help you.

Many charities would love their board to be more inclusive and diverse and are actively working to achieve this. Some charities are open to diversifying the board but haven't fully understood the benefits this could bring or know how to achieve this in an equitable way. But others have failed to recognise the need to diversify their board, don't see this as a priority, or are motivated by funders' requirements rather than an internal desire for change.

We can't sugar-coat it: there are times when individuals are appointed as charity trustees purely because of their gender, age, dis/ability, ethnicity or some other protected characteristic. Their subsequent experience is that their voice is not heard by their fellow trustees. Whether this is because boards have been tokenistic, or are well-intentioned but not truly inclusive, it is a serious issue that needs to change.

Achieving meaningful diversity and inclusion is difficult and takes time. It can also be lonely. If you suspect a charity is recruiting you for the wrong reasons it's okay to decide it's not your fight. If you do decide to stay on, you may want to encourage the charity to recruit others who are different from the board's norm and who may be important allies in achieving change.

## Feeling confident about what you can offer

You may instantly see the skills and other qualities you can bring to a trustee role, and feel very confident of finding a charity that would benefit from them. Or you might also be thinking, “I don’t have the skills charities are looking for or enough experience – shall I just come back in 10 years’ time?”

Imposter syndrome can apply just as much to volunteering roles, such as being a charity trustee, as it can to paid roles. Some of the insecurity people feel comes from misconceptions about who can be charity trustees, or thinking that you have to be ‘cherry-picked’. We hope the section of this guide about barriers to trusteeship helps you to overcome these concerns.

**“Don’t be put off by thinking you might not have the ‘right’ experience or skills. You should be given support so you can understand your role even if you don’t have prior knowledge of what a trustee does.”**

Jessica

Charities are not simply looking for one type of person to be a trustee, so even if your experience is quite niche or feels pretty average it may still be useful.

You might also feel embarrassed because you know you will need training and possibly mentoring from the charity, or help with practical needs such as covering the costs of childcare so you can attend board meetings. Don’t let these things discourage you. As you start to make applications and talk to different charities, you can ask them what support they can provide.

**“My only challenge [to becoming a trustee] was a lack of confidence – I didn’t see what I could offer. In fact, even my experience of social media was useful, and far more than any other trustee had!”**

Millie

It may simply be a case of building up your confidence and submitting a couple of applications may help you to do this. It might help to talk through with a trusted friend or colleague the qualities that they admire about you and the strengths that you have that you might be able to bring to a trustee role. But if you genuinely feel you don’t have the skills or experience, or are finding your applications aren’t getting very far, then here are some practical tips on how to broaden what you have to offer:

- Find a volunteering role at a charity or in your local community – this doesn’t need to be as a trustee or in an administrative role: meeting service users and seeing first-hand the challenges they may face, or how team dynamics can influence what is achieved, can give you an insight into how charities work.
- Explore with your manager at work whether there are projects or tasks that you can become involved with that would broaden your skills set or build on your leadership capability.
- Expand your network – there are many sector groups and specialist networks that may provide you with mentoring or contacts to help you develop what you have to offer and get a foot in the door; for example, the [Young Trustees Movement](#)<sup>19</sup>, [Action on Trustee Racial Diversity](#)<sup>20</sup>, the [Beyond Suffrage Campaign and Programme](#)<sup>21</sup> and [Getting on Board](#).

- Ask if you can chat to or shadow a trustee of a charity whose work interests you – this might give you some insights into the role, which help you feel more confident or identify other ways of growing your expertise to prepare you for a role in the future.
- Remember, becoming a charity trustee is not about waiting for the perfect match, but giving it a go where you feel you’ll have something to offer and that this will be appreciated.

**Take yourself back to why you’re thinking of becoming a trustee and what you’re looking for. Let it inspire you. Remind yourself of the different qualities you have to offer that charities are looking for, and what you’re looking for from them... then start searching for opportunities that bring these things together.**



Credit: VODA



# PART C

# FIND AND APPLY FOR TRUSTEE ROLES



# 3. SEARCH

# TRUSTEE VACANCIES

## How do I find what opportunities are out there?

There are several ways of finding trustee vacancies including:

- Trustee finder websites (see below)
- Organisations like Getting on Board – we run workshops for potential trustees, trustee fairs to help match individuals with charities, and we maintain vacancy lists from charities that have contacted us, so we regularly post vacancies on our social media channels
- Follow Getting on Board on Twitter (@gettingonboard) and LinkedIn (“Getting on Board”) to see the latest vacancies.
- Charity social media posts
- Charity newsletters or e-bulletins
- Local noticeboards or newspapers
- Local councils for voluntary service (CVSs) and volunteer centres – where local charities and community groups come together; you can find your nearest CVS at <https://navca.org.uk/find-a-member-1>
- Professional bodies – for example, the Institute of Chartered Accountants in England and Wales (ICAEW) has its own volunteer website for finance professionals which advertises trustee roles ([www.icaewvolunteers.com](http://www.icaewvolunteers.com)); the Media Trust also enables charities to post voluntary roles for free for communications professionals (<https://mediatrust.org>)
- Through other networks such as [Action for Trustee Racial Diversity](#)<sup>22</sup>, the [Young Trustees Movement](#)<sup>23</sup>, and the [Beyond Suffrage Campaign and Programme](#)<sup>24</sup>
- Through recruitment agencies that specialise in trustee recruitment
- By proactively contacting a charity that isn’t currently openly advertising to make a speculative approach (see below).

## What trustee finder websites are available?

There are several trustee finder websites you can use – and you might find the same vacancies posted on different platforms. Here are some of our favourites:

### Reach Volunteering

<https://reachvolunteering.org.uk/volunteers/become-trustee>

### CharityJob

[www.charityjob.co.uk/volunteer-jobs](http://www.charityjob.co.uk/volunteer-jobs)

### Guardian Jobs

<https://jobs.theguardian.com>

### Do-it

<https://do-it.org/channels/trustee-finder>

### LinkedIn

[www.linkedin.com/jobs/trustee-jobs/?country=gb](http://www.linkedin.com/jobs/trustee-jobs/?country=gb)

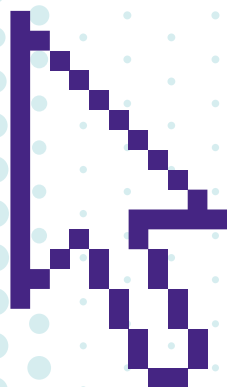
### Third Sector Volunteering

<https://volunteering.thirdsector.co.uk>

### Trustees Unlimited

<https://trustees-unlimited.co.uk/roles>

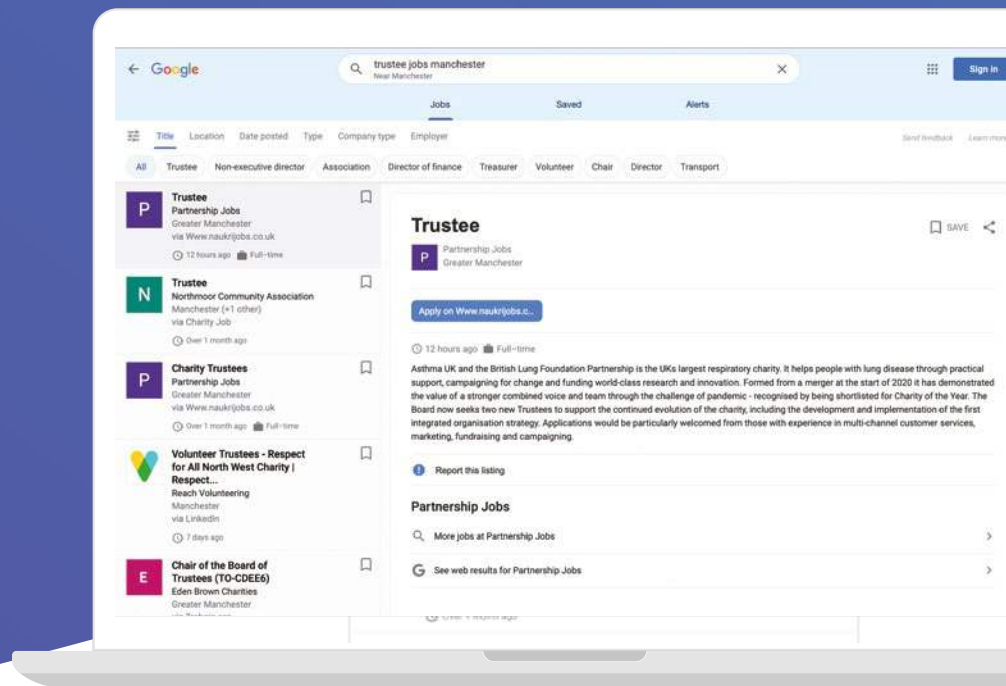
When searching on these websites it is important to note that some advertise paid jobs and other volunteering roles, as well as trustee roles.



You can also search in Google: Type in “Trustee+job+[your location]” or “Trustee+job+[the charitable cause in which you are interested]” and it will ‘mine’ trustee vacancies from the websites above, as well as others. Just scroll down past the paid advertisement results and see the roles in the blue section headed ‘Jobs’.

Some adverts stay on the sites long after their closing date, so check if the advert is still live.

Having a browse through trustee finder websites can give you a good sense of the roles out there and some of the attributes that charities are looking for.



## What about making a speculative approach?

Our 2017 research showed that 90% of charities still recruit most of their trustees through word of mouth and existing networks. We’re working hard to change that, but you may miss lots of brilliant opportunities if you only look at trustee finder websites and other adverts. So, consider proactively contacting charities, as well as applying for openly advertised roles.

You can find charities in your area: through social media, neighbourhood magazines or local press, online search engines, or just by walking down the street.

In England, Wales, Northern Ireland and Scotland you can search for charities online.

- In England and Wales, use the [Register of Charities](#) on the Charity Commission’s website, to search for charities that interest you. Use the ‘[advanced search](#)’ function to filter charities by location, cause, type of people the charity supports or the charity’s income.

- In Scotland, you can search or download the [Scottish Charity Register](#) from the website of the Office of the Scottish Charity Regulator (OSCR)<sup>27</sup>.
- In Northern Ireland, you can search the Charity Commission for Northern Ireland’s [Register of Charities](#)<sup>28</sup>.

You can use these websites, or a search engine, to look for keywords in a charity’s name or objects (the objects are the statement that describes what a charity has been set up to do). Then send the charity a short speculative message.

Here is some text you could use:

I am a [teacher/accountant/student (etc.)], with knowledge/understanding of [X and Y]. I am interested in using my skills to support your charity as a trustee.

May I apply to join your board, or could we arrange a conversation to discuss what I might be able to offer in more detail?

I look forward to hearing from you...”

A speculative approach can be very short.

It is best if you can find the contact details of the CEO or charity manager (if they have one) or chair of trustees.

If you can’t, send it to the charity’s general email address – which you can find on the [Register of Charities](#) or the charity’s own website – and put “For the attention of the Chair of Trustees” in the subject line. It’s even better if you can add the chair’s name, if you can get it from the charity’s website or the charity’s trustees’ annual report and accounts on the Charity Commission’s website.

**“I am very interested in your work and I am emailing speculatively to see if you would consider an application from me to be a trustee.”**



# 4. SHORTLIST AND CONDUCT CHECKS ON CHARITIES



Credit: Heatherwick Studio / Maggie's, Leeds

Maggie's is a charity providing free cancer support and information in centres across the UK and online.

## How do I find a good match?

As you start to search for potential opportunities, you'll realise that there are lots of options out there! You should be willing and prepared to apply to several charities, but you also want to focus your search on those that you think will really be a good match for you.

- **Be realistic** – you are unlikely to join the board of a large charity like the National Trust or Cancer Research UK as your first role.
- **Be honest with yourself** – about what you're hoping to gain from the role, the commitment you can make, and what you have to offer. Don't sell yourself short or over-egg your abilities. Remember: everyone has skills and experiences they can bring to the table, and there's huge potential to develop these further once you're in the role.
- **Be inspired** – if a charity's cause or the way it supports people gets you excited, that's a great place to start. And think about the stage the charity is up to in its lifecycle and how that suits you as a person. For example, if you're

quite entrepreneurial you might like a younger charity that's still in start-up mode. For others, charities that are more established and in a 'steady state' might appeal more, or you might look for a charity that has ambitions to expand or change the way it works.

The recruitment process is a chance for you to test out whether a charity really is a good match for you. As you start (and continue) your research, some questions to ask yourself include:

- Do I feel excited about what the charity does and the way it addresses the cause it is dealing with?
- Do I think I have the skills, ideas and/or experience the charity needs?
- Do I feel inspired to give the charity the amount of time it is asking for?
- Am I enthusiastic about the stage the charity is at in its lifecycle and the way it works?
- From what I can see, does it look like the board of trustees has a healthy balance of skills, experience and

other qualities? If not, am I willing to bring fresh insight even if I am different to others around the table, and to help encourage others to join us, to broaden out the mix?

- Do I feel that the charity will value what I have to offer?
- Will I get the support and encouragement that I need?



We've put together a template form to help you keep track of the vacancies you've found that are of interest, any particular observations that stand out to you, and which stage in the application process you're up to. Take a look at the resources page on [Getting on Board's website](#).

## What checks should I carry out on a charity before applying to become a trustee?

You might have curated quite a long list of potential roles from the vacancies or charities that you've found. It's worth picking a shortlist of the ones that stand out to you most and then carrying out some checks ('due diligence') before applying.

There may also be some 'wildcards' that end up in your shortlist: charities that don't tick all the boxes based on your pre-selected criteria, but which really grab you anyway. Don't feel you have to discount them – you can still explore to see where the opportunity takes you.

Focused research into your shortlist of charities will help you understand more about:

- What the charity does
- How well it is run
- Its key priorities and challenges
- When and where meetings are held
- The skills and experience they're looking for in trustees
- Whether the role will deliver what you're hoping to get out of it.

This will help you decide whether it looks like a good fit for you and enable you to craft a better application.

Useful places to look in your research are:

- The charity's entry on the Register of Charities<sup>29</sup> – this will give a useful snapshot of what the charity does, where it operates, who its trustees are and its financial history. The Charity Commission also flags up charities that have filed their accounts late – if it has a red circle with a cross at the top of its register entry you should steer clear. You can also see under 'Accounts and annual returns' whether it has filed these late in the past five years – if they have repeatedly filed late this would definitely be a cause for concern.
- Their trustees' annual report and accounts – you can find these on the charity's entry on the [Register of Charities](#). These are another great source of information about the charity's achievements, future plans, financial position and governance.



- The [Register of Companies](#)<sup>30</sup> at Companies House – to check if a charity is incorporated. (See What about liability? p.15, for why this matters).
- The charity's own website, social media and other publications – some charities put together a recruitment pack for potential trustees, with more information about the charity and the role.

You could also speak to someone at the charity or visit their services if possible, or volunteer with them if time allows.

As you research different charities, have in mind the key things that you are looking for in a role. Be open to the fact that a charity may really pull on your heartstrings, even if it's different to what you thought you wanted. Objectively think about whether you can make it work and, if so, don't be afraid of trying something different from what you expected.



Credit: Ferne Animal Sanctuary  
Ferne Animal Sanctuary cares for unwanted and abandoned animals.

**“Firstly, don’t be daunted. Being a trustee sounds like a role for a small, specific sub-section of the population. But it’s not. Back yourself! Secondly, look around for examples/case studies from others who have become trustees. Thirdly, look and ask questions.”**

**George**

# 5. APPLY FOR TRUSTEE ROLES

## Taking the leap – how do I go from interest to application?

### What's the application process?

A trustee finder website (such as those listed above) might have an online form to complete. Some charities may ask you to complete an application form in their recruitment pack or an online application via the jobs portal on their website.

However, it's common for charities to ask for a CV and a cover letter explaining why you're interested in the role.

You might also be asked to attend an interview and/or, if you're shortlisted, be asked to observe a board meeting.

It may be possible for you to have an informal chat with the charity before submitting an application. This can be a really helpful way of clarifying anything you're unsure about or testing whether the charity feels like a good match before going through all the effort of producing an application. We encourage charities to include in their advert whether they are happy to talk to potential applicants and to provide contact details. If you're not sure whether this is an option, just ask.

**Remember, the recruitment process is as much an opportunity for you to find out if the charity is a good fit for you as the other way around.**

The overall recruitment process may take some time – be prepared to be patient. If you're unsure how your application is progressing, then you can follow it up with the person who responded when you submitted it – but bear in mind that trustee recruitment will be just one of the things they're dealing with.

### How do I write a cover letter for an application?

It's a good idea to create your own template cover letter, which you can then tailor for different charities. You should include:

- Why you want the role
- How you meet the criteria they're looking for
- Why you'd be a great addition to their board
- Why the charity's cause matters to you.

Charities love to hear what enthuses you about them and the difference they're making in the world. Show that you've done your research. Relate the challenges and opportunities the charity is facing to what you have to offer. This applies whether you're responding to an open advert or contacting the charity speculatively.

Your cover letter might be much more personal for a trustee application than it would be for a job. Why does the charity's cause matter so much to you? Maybe you have lived experience



Credit: Joyce Nicholls/Brook

of the issues the charity deals with or another personal connection to the cause. This can make all the difference, as it may show the depth of understanding and passion you have for why the charity exists. You may also want to tap into the charity's values and vision to demonstrate how you've exemplified those values in a different context.

Your cover letter doesn't need to be very long – ideally no more than one page, two pages at an absolute maximum. You might find it helpful to ask a trusted friend or colleague to read your cover letter to see if your enthusiasm shines through authentically and to make sure that it really captures your strengths.

As with job applications, keep a copy of what you've included in each application so you can reuse or refine it for other applications. This will also help you prepare for an interview or induction if you progress to those stages.



A very quick summary of your skills, knowledge and experience. Make sure you use terms that someone from a different field to yours will understand. This can also include the relevant experience you've gained in a non-work context.

If you live in a different place to where the trustees meet, make sure you explain that you can travel to meetings. If the charity services a local area that you don't live in, explain why you have an interest in that area.

If there isn't a named person in the trustee ad, address it to the charity's Chair of Trustees or CEO.

Your passion for this charity should be loud and clear.

Make it clear that you've done your homework on the charity. The letter should read like you're applying to this charity alone!

Contact name  
Charity's name  
Charity's address  
By email to: (email address)

Date

Dear (contact name)

I am writing to express my interest in becoming a Trustee of (Charity name). I believe I have the experience and commitment to serve (Charity name) well given my (relevant professional areas, e.g. social work, marketing) expertise and my experience in (your career/leadership/lived experience in a nutshell).

I find your mission to (charity mission, e.g. remove barriers to healthcare for vulnerable people) inspiring. I admire your (services, approach...) and I would like to support the organisation by joining your board of trustees.

I am currently (current role/course/other situation and experience this gives you). (More on previous career and other experience. If you are applying for an advertised vacancy, structure this section by the skills/knowledge/experience they are asking for – how do you meet their requirements?)

(Outline any other relevant experience, volunteering, board experience, personal reasons for having an affinity to the cause.)

My (professional/lived experience/educational/volunteering areas) input would serve (Charity name) well. In turn, I would find the opportunity immensely rewarding, in playing a role in the charity's strategic development, and in enabling it to (charity's mission, e.g. remove barriers to healthcare).

I am attaching my CV and I look forward to hearing from you soon.

Yours sincerely  
Your name

This paragraph is really key. Charities can find it a real turn-off if they think applicants are just applying so they can bulk out their work CV and get a promotion. They will want to see that you have a real heart for what they do (even if one of your motivations is also your professional development).

If they specifically ask for other things, like having the time to commit to the role, make sure you reference this.

If the charity has said they particularly want to recruit more diverse trustees or specific groups that are under-represented, and you fall into that category, then you can mention this here too (if you feel comfortable to do so). You could also say why you think yours would be a valuable voice for others to hear.

If you can relate how you will be useful to tackle the charity's particular challenges, all the better. Their annual report on the Charity Commission website is often a useful place to find out the charity's strategic priorities, e.g. fundraising, marketing, growth, moving premises.

## How do I tailor my CV?

Don't just send your usual professional CV – chances are it won't fit the bill! For paid roles, it's often important to show we understand the jargon used in our industry, and CVs can be littered with acronyms to save on space. But that can be a real turn-off in a CV for a role outside of that profession or industry. This is because the person reading it at the charity may not be familiar with your particular role or work environment, so simply won't understand what you can bring.

These are our top tips for tailoring your CV:

- Explain what you do in simple terms and plain English
- Stick to a maximum of two sides of A4
- Take out detail if it won't be understood or isn't relevant to the role – you can summarise key skills and achievements instead, particularly if these are transferable to what the charity needs
- Show the skills and experience you have that are relevant to a trustee role, and how these match the charity's role description, person specification or advert
- Feel empowered to include more information about personal interests, hobbies and other volunteering you've done (even if you wouldn't include this in a work-based CV).
- Say that you are actively looking to join a charity board and say why
- Avoid using acronyms or jargon.



**You can find a template cover letter and CV on [Getting on Board's website](#), with some examples.**

Remember, your CV and cover letter should complement rather than duplicate one another.

If the charity has produced a role description or person specification, your CV should show how you match up to this.

You can find a template CV for a trustee role on our website – but feel free to be creative!

We recognise that not everyone has an up-to-date CV or feels comfortable writing a cover letter. These will look different for a trustee role than if you were applying for a paid job, so that may help you feel more confident about producing them.

We hope the tips above are also useful, and you may be able to draw on support from family, friends or work colleagues to help decide what to include or check that it's clear what you have to offer the charity, and how well it reads.

If producing a written application is in itself a significant barrier for you, but you're really keen on the role and can see you have what the charity is looking for, then you could contact the charity to see if they'd accept an application in a different format – for example, a short video of you talking about why you're interested and what you have to offer.

If you have lived experience that is relevant to the role and that makes a written application more difficult, that will be worth mentioning (if you're comfortable with this), especially if lived experience is one of the qualities the charity is looking for.

There are no guarantees a charity will accept an application in a different format, but some may be impressed by your initiative and commitment. As charities become more adept at advertising trustee roles, the range of tools they use to receive applications should grow – but there's no harm in you giving them some ideas!



**“I am disabled so my working life is limited. I have volunteered from a young age for numerous third sector organisations in a range of roles, including administration, teaching, event organisation, writing equality policies and book-keeping. My working history didn't relate to my trustee role, however, my experiences as a disabled student certainly did. I did find, on the other hand, that many of the skills I had gained in working and voluntary roles useful as a trustee, and often complimented the skills held by fellow trustees.”**

Laila Dunbar, formerly a trustee of Campus Living Villages Foundation



**You can find a template cover letter and CV on Getting on Board's website, with some examples.**

**“As a youth worker, my current charity really benefits from my expertise in safeguarding. There is a direct connection between my job and how I volunteer for my charity board, and if I left, they would need to replace me with someone with similar experience.”**

Asya

**“I started my post-university career as an office administrator for a sales company, moving into an educational charity and then a national membership organisation, where I stayed for 10 years. The work I do now is really obviously relevant to trusteeship, but it wasn't always. My first role (at NIWE Eating Distress) was specifically because they wanted more young trustees to bring a broader experience to their board.”**

Kathryn Sullivan, primary school governor and previously chair of VAC (Voluntary Action Camden), IDRAS (Improving Dispute Resolution Advisory Service) and NIWE Eating Distress



# 6. PREPARE FOR INTERVIEW

## What happens next?

A charity may have received a large number of applications or just a few. It will sift these to find those that most closely meet what it is looking for. If this includes your application, you may be asked to have a telephone or video call with the chair and/or another trustee or be invited to an interview in person.

If your application isn't successful, don't be disheartened. It may simply be that there were other applicants with skills, experience or other qualities that more closely suited what the charity was looking for.

You may want to ask the charity for feedback on your application and any points you can learn, and which you can apply to future applications. The charity may be more likely to provide this the further through the process you've got, particularly if they've had quite a few applications.

Use this opportunity to also take stock of how you found the process, whether there's anything in the tone or content of your application that you'd change next time, and what your next steps will be. Then get back out there and keep on applying for new opportunities.

## How do I prepare for an interview?

If you're invited to an interview, this might be quite a formal process, or very relaxed and informal depending on the charity. You should expect to meet with 2 to 3 of the trustees and/or the CEO or charity manager (if they have one). This might be online or in person. It can be more daunting meeting a panel but can help the

charity more fairly decide which individuals have the best skills and experience for the role.

We asked some current trustees what their interviews were like:

**"I was given an opportunity to have an informal coffee with the chair of the board where I could ask questions and get to know the charity a little bit. I had to put in an application and then attended an interview where I was interviewed by two separate groups."**

Cassie

**"The interview was informal - both sides were assessing if it was a good fit! The charity clearly was a bit uncertain about what they could ask for from a 'stranger' (their first time openly recruiting a trustee). However, it was a pleasant experience which went well, and obviously I did go on to become a trustee!"**

Millie

**"[My interview] was timely and professional – it was not conducted with me in mind though. It was a system set up for people with time on their hands, or people who could clear their calendars for inductions and interviews. The interview was a good experience – I was made to feel welcome and though it wasn't a combative experience. It was a mutual fact-finding exercise, which I think the best interviews are."**

Joe

**"It started with an informal request for me to check out their charity. Then an informal call to discuss synergies. Then I submitted my CV and had a mini interview with some of the board on zoom. They liked me, and sent the paperwork straight away."**

Michelle



The interview is an opportunity to demonstrate that you've done your research and to dig a bit deeper in the areas that you're still unsure about. Some great questions for you to ask the charity include:

- What makes you excited about your work?
- What challenges are you likely to face in the next 3 to 5 years?
- How do you see your charity's work evolving in the next few years?
- What skills are you missing from your board? Is that due to recent changes or have you been looking for those skills for a while?
- What is the time commitment, and what does that include?
- How are trustees involved outside of board meetings?



Credit: Flamingo Chicks

- How do you support trustees through their induction and ongoing learning?

You should also think about the questions the charity might ask you. For example:

- Why would you like to join the board of this particular charity?
- If you haven't been a trustee before, why now?
- What skills, experience or ideas do you have that might be useful to the charity?
- What are you most looking forward to about becoming a trustee?



**In our resources for charities, we've compiled a more extensive list of questions for them to ask potential trustees. This is available on our website. You might find it helpful to look at these to help you prepare.**

- Can you tell me about a time you've had to make a difficult decision? How did you approach it?

Answer openly and honestly. Don't feel like you have to go beyond your current expertise, though – ask if you're not sure what they mean and say you're keen to learn. Be diplomatic if they ask for your ideas on how things could be improved.

It's possible the charity may ask you to attend more than one interview – perhaps an informal chat initially, then a more formal process, or for the dialogue to continue over a few weeks before the charity reaches a final decision. This can be a great way for both you and the charity to get to know one another better before making a commitment and may be more common if the charity hasn't tried openly recruiting trustees before.

If your interview goes well and the charity is keen to appoint you as a trustee, you may be invited to observe a board meeting. This gives you an opportunity to see the board of trustees in action – the types of issues that they discuss, the way they interact with each other and with any staff that are present, and how they make decisions. It also provides a chance for you to meet people and assess what it might be like to work alongside them as a trustee.

Expect the information that is discussed to be confidential and do not share or discuss this with anyone else unless the charity has given you clear permission to do so. You might be asked to introduce yourself briefly, and then to stay silent or to contribute to discussions if invited to do so. You should check in advance what is expected of you. If you have questions or ideas, you can follow this up after the meeting with the chair or your point of contact at the charity.

It can take some time for a charity to decide who they want to appoint. If the conversation is continuing then that's a good sign, but don't be afraid to ask for updates on the progress of your application.

If your application is successful, then you will be formally appointed as a trustee. Even if you aren't offered the role this time around, there will still be other opportunities. Feel free to ask the charity to provide feedback to you. Take a moment to reflect on what went well, what could have been better, and what you'll do in your next application or interview. Then get back out there!

**"Becoming a trustee puts you at the heart of an organisation and means you can really see how it works. Try and gain as much of that understanding before you make a decision and commit to continuing to learn and understand once you're in the role, by attending meetings, getting to know projects and staff."**

Isobel

# PART D

# THE EXPERIENCE OF BEING A TRUSTEE

A young boy with dark hair is looking down at a large sheet of paper that is covered in small, dark, irregular marks, possibly a map or a drawing. The image is overlaid with a semi-transparent orange circle. The background is a solid orange color.

# 7. BE FORMALLY APPOINTED AND INDUCTED

**The timing of your formal appointment may depend on certain meeting dates and will be dictated by how trustees are appointed under the charity's governing document (the document that describes how the charity must be run).**

For example, you might be appointed by the other trustees at their next meeting, or you may need to be elected by the charity's members, such as at an Annual General Meeting (AGM).

This can mean there is a time lag between the recruitment process and your formal appointment. Be patient and if you're unsure of the process or what's causing any delays then speak to the charity about this.

You should be asked to sign a declaration form to confirm you are eligible to be a trustee (i.e. that you haven't been automatically disqualified from serving as trustee), as this is good practice. Depending on the type of charity, you may also be asked to have a DBS ('disclosure and barring scheme') criminal record check – for example, if the charity works with children and young people, or adults at risk.

Subject to these checks, it is good practice for a charity to confirm your appointment to you in writing, with the length of the term you will serve

as a trustee, and whether this could be extended.

You will need to provide the charity with some personal details, to provide to the Charity Commission (and Companies House, if the charity is a company). These include:

- Your full name (as it would appear on a passport or driving licence)
- Your title
- Any previous names that you've been known by
- Your address
- Your telephone number
- Your email address (or confirmation that you do not have an email address)
- Details of any other registered charities that you are a charity trustee of.

Most of this information is used by the Charity Commission only, but your full name will be displayed on the charity's entry on the Register of Charities.

If there are good reasons why your name should not be included on the public Register of Charities then the charity can request that these details are not displayed.

The decision about whether or not a trustee's name should be displayed publicly will be decided by the Charity Commission. This may apply to some or all of the trustees. It is only likely to apply in exceptional circumstances.

For example, if the charity runs a women's refuge and its trustees include survivors of abuse, then they may be at risk if their names are displayed. The public Register of Charities should include a link to any other charities you are a trustee of.

The charity may also ask you to complete information for its 'register of interests'. This may include: details about your employer; other paid work you undertake or other business interests; whether you are a director of any (other) companies or a trustee or director of any other charities; community groups or social enterprises; and other voluntary roles and/or memberships you have.

It is good practice for a charity to ask for this information to help identify if there is potential for these other interests to conflict with your trustee role (either generally, or on a one-off basis if a particular decision or issue arises). This is so the charity can ensure that any potential conflict of interest or loyalty is properly managed, and to protect the charity's reputation.



## So you've become a charity trustee – congratulations!

### What should I expect from an induction?

Once you have been added to the Register of Charities, as a charity trustee you will be emailed a 'Welcome Pack' by the Charity Commission. This includes links to some of their key guidance for trustees. It might seem a bit daunting, particularly when it's your first trustee role. But as you get settled into the role it will become easier to see how the Charity Commission's guidance applies in practice.

You should also receive an induction from the charity – and if this isn't offered proactively, you should ask for one. It is important for both new trustees, who haven't been involved with the charity before, and those who may be more familiar with the charity's work and who have volunteered with the charity in other ways.

This is also your chance to ask for any adaptations that you may need, such as meetings being held in accessible locations, or papers being provided in an alternative format.



Credit: The Felix Project / Ade Kehinde  
Felix Project is a London based charity that saves surplus food from suppliers and redistributes it to charities and primary schools across the capital.

As we say to charities, a well-thought-out induction:

- Sets the tone for your future relationship – it reinforces the positive first impression created during the recruitment process, and shows that both you and the charity are serious about the important contribution trustees have to make
- Manages expectations of both trustees and the charity about the role and commitment
- Helps you get up to speed quickly, so you can hit the ground running
- Builds board cohesiveness between new and existing trustees.

Your induction won't necessarily happen all at once and may span your first 2 to 3 months, although we recommend that charities initiate your induction sooner rather than later.

If a number of new trustees have been appointed at the same time, then some of your induction may be undertaken as a group. This can help you to build relationships, as you can learn together, and can give you someone to bounce around ideas and questions with. It can also make it easier to raise questions with the charity if there's more than one of you wondering about them.

Whether your induction is done as a group or 1:1 it should be tailored to provide the tools you need individually to carry out your trustee role well. If you feel you need extra support, additional information, or just for the charity to run through things with you one extra time, then do just ask.

**"Being part of the trustee board wasn't anywhere near as scary as I thought it would be! The trustees were all really welcoming and made me feel part of the team from day one."**

Francesca Campbell, trustee of Pirate Castle



Credit: Heathrow Community Trust / Thamesmead School

Your induction for the charity might include:

- A pack of documents, which might include some or all of the following:
  - The charity's governing document (which explains what it is set up to do, how trustees are appointed, how meetings are held, and broadly how decisions are made).
  - The latest trustees' annual report and accounts
  - Minutes of the most recent trustee meetings (i.e. a record of what was decided)
  - The charity's strategy and/or business plan explaining what it plans to do in the next 1, 3 or 5 years.
  - A trustee role description and/or code of conduct, setting out what the charity and its trustees can expect from one another
  - Contact details for the other trustees and/or key members of staff
  - An organisation chart
- Terms of reference for any committees or working groups that the charity has
- Copies or links to the charity's policies that have been approved by the board of trustees; such as financial thresholds for expenditure, or safeguarding
- A telephone or video call, or meeting with the chair of the board of trustees, the charity's CEO or charity manager (if it has one) and/or other key members of staff and volunteers
- Attending a training course for trustees, either in person or online
- A visit to some of the charity's services or an opportunity to meet with some of the charity's service users
- An opportunity to meet the other trustees – this might be an informal get-together before or after your first board meeting, or extra time set aside for a coffee break so you can chat to people.

Don't feel overwhelmed by all this information. It often takes new trustees a few months to get settled into the role. Be confident about asking questions and making suggestions in meetings during this time – these initial observations are often very valuable.

On a practical level, it is also useful to ensure that the charity:

- Gives you access to any shared computer drives used by trustees (if applicable), so that you can access documents electronically and/or obtain the latest versions of policy and other documents
- Shares with you contact details for key individuals including other trustees, the CEO and the person who deals with the logistics of trustee meetings
- Provides a copy of the trustee expenses policy and claim form so you know what reasonable expenses you will be reimbursed for and how to claim them
- Provides details of upcoming events and important dates (e.g. board meetings) including the date, time and location
- Ensures that you are aware of any trustee indemnity insurance policy that is in place and any limits on the cover.



**You can find some example induction packs that charities have produced on Getting on Board's website.**



# 8. KEEP LEARNING AND BEING A GREAT TRUSTEE!



## Being an effective charity trustee

So, you've landed a great trustee role, your induction process is complete and you're raring to go! Still don't feel quite prepared? That's completely normal! Even veteran trustees can find it takes time to get into their stride when they join a new board, especially as the experience of being a trustee can vary from one charity to another. And even with a great induction, it can still take a few months to get to grips with how things work and to be confident you're doing things right.



Credit: Lightyear Foundation  
Lightyear Foundation is a charity that works to break down barriers to getting more disabled people into STEMM (Science - Technology - Engineering - Maths and Medicine).

**"I've served on boards for almost 28 years. Not a day goes by where I don't learn something new."**

**Srabani Sen, OBE, chair of trustees at ActionAid UK and at The Winch**

Having gone to the effort of finding a role, you obviously want to be an effective trustee and have a really positive impact on the charity. Here are some tips and insights to help you achieve your potential.

## Start with the basics

Although you will have researched the charity during the application and interview process, as your knowledge of the charity grows you can deepen and refine your understanding of what it does and how it works. It can be helpful to come back to these questions from time to time, to focus your thinking, and to remind yourself of how much you've learnt:

- What does the charity do and who does it do it for?
- Why? What are the reasons service users need or want the charity's support?
- How does it do it? Is this/should this be changing in the months/years ahead?
- Where does it get its money from and how does it spend it?
- Who does it work with? This includes: staffing structures; the number and type of volunteers; the service users it supports; partner organisations it works with; and other charities, funders and organisations in its sub-sector, including regulators, local authorities, national government departments, the NHS or schools.





Credit: Joyce Nicholls / Brook

## Setting the tone

Conducting yourself well – both in and outside of board meetings – is vital if you are to maintain the respect and confidence of your fellow trustees and serve the charity well. We've included below some examples of what that will look like in practice.

- **Be present and prepared for meetings** – this means 'present' both physically and mentally. If you're in the room but your mind is focused elsewhere or you're slyly reading work emails, you're not likely to add much gold to the discussion. Put your phone away, log out of emails, and concentrate on the task in hand. Make sure you've read papers ahead of the meeting, have thought through the questions or comments you have, and are ready to provide an update on any actions you've been asked to lead.
- **Ask questions** – they might seem like stupid questions to you, but often these are the most important. Being a new trustee is a great opportunity to ask for clarification on things you might think are obvious to everyone, but which might not be. Longer-serving trustees might feel silly asking about something they think they should already know, or feel blindsided by how things have been done. Sometimes what seems like a straightforward question reveals the elephant in the room and really needs addressing, but others have become too afraid to mention it. Or it may just be something simple: if it will help you understand more and do your role better, why not ask?
- **Don't be surprised by a bit of healthy debate** – a board that just passively agrees all the time or accepts the information provided by staff unquestioningly can be just as destructive as one that can't make a decision because of constant arguing. Constructive challenge and a robust discussion about different views and the options available can lead to well-rounded, good decisions. This should apply to the important stuff though: don't encourage a two-hour debate about the colour of the new curtains! The discussion should obviously stay 'professional'

and courteous, so don't let a debate become personal. Once the board has made a final decision, it's important that the entire board gets behind it, so that the charity can move forward. The exception to this is if circumstances change, or the decision was materially based on information that is incomplete or inaccurate. In that scenario, the board may wish to affirm whether it wants to go ahead.

- **Stay focused on the charity's purpose and mission** – it can be easy to become distracted by new funding opportunities or initiatives. But beware of mission drift! You obviously don't want to discount great ideas and possibilities out of hand, but assess them against the charity's objectives and the strategy you've agreed as a board. Does the charity currently fit the funding criteria? Is it a project that you'd planned to do or are you being motivated by the promise of more money? Does it clearly fall within your charitable objects and how will it support service users?
- **Balance long-term thinking with the here and now** – one of the challenges of being a trustee is that you are a steward of the charity's resources and purposes for both current service users and those that the charity will support in years to come. If you only focus on the long term, the charity won't provide the support needed by people today. But if you don't factor in how the charity will operate and develop in the future, then it won't have the resources and drive to support people in 5, 10, or 20-years' time. Some charities will have a short lifespan, set up to meet a very particular need that can be achieved in a relatively short timeframe. But most are meeting needs that will continue or evolve over decades and part of the trustees' role is to consider how you can ensure the charity is there to meet those needs.

**“Find the right cause that you deeply care [about]. Bring your core skills. Commit and be generous with your time. Cultivate curiosity, honesty and inclusivity. Ask questions.”**

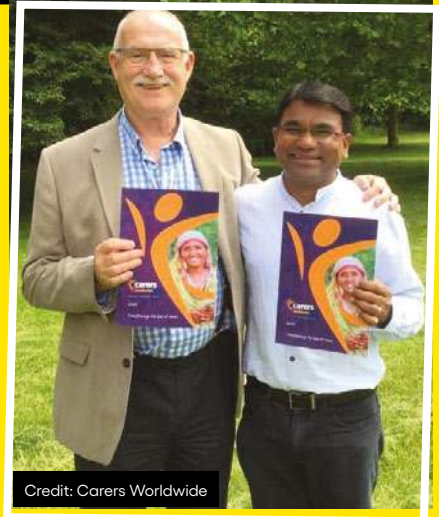
Olga

- **Learn to hold others to account** – having the confidence to hold others to account – and to demonstrate accountability – is a valuable contribution you can make as a trustee. This includes ensuring that staff, volunteers or fellow trustees deliver what they have said they will and stretching them to do more when appropriate; highlighting when what is presented falls short of what is expected; or calling out bad behaviour or practice. It also captures the responsibility you have to others: to meet their fair expectations, to do what you’ve said you’ll do, and to live the charity’s values. Ensuring the board provides service users, staff and volunteers with opportunities to provide feedback to the board, give input on ideas, and question decisions that have been made also come into this. It’s as much an art as



a science.

- **Respect confidentiality** – the information you are provided and the decisions the board makes may relate to sensitive, controversial or personal information. The information you are given will often be confidential – it may be damaging to the charity’s operations, morale or reputation if this is shared outside of the boardroom or in a way that hasn’t been agreed. It goes without saying that it is imperative that trustees respect the confidentiality with which information is shared. This also includes not speaking to the press or on social media on behalf of the charity (or where it could be perceived you are speaking for the charity) unless you are authorised to do so. This obviously does not apply if you need to report criminal activity to the police or for whistleblowing to a regulator.
- **Keep learning** – as an individual and as a board - you will be better able to serve the charity and its service users if you continue to reflect on what you have learnt so far, what things may have changed, and where there may be gaps in your understanding. How can you actively apply what you’ve learnt and keep filling the gaps? Even after you’ve been on the board for a while, ask yourself if you are still learning and still contributing – the answer should be ‘yes’ to both.



Credit: Carers Worldwide

- **Recognise when it’s time to move on** – you may have heard of trustees who have stayed in their role for 25 years. In exceptional circumstances this can benefit the charity, but nine times out of ten, it is more valuable to have a balance of experience and knowledge of the charity alongside fresh insight and new skills. You may well be appointed for a fixed amount of time, and there may be an option for you to serve a second term. If the role is going well and you are making a useful contribution to the charity, you will obviously want to see your term through to the end. Keep in mind that, if you care about what the charity does and who it supports, you may feel that you never want to leave. But that’s unlikely to be good for the charity in the long term! Leave well, by helping with succession planning, and before you’ve outstayed your welcome.

### Can you tell me more about...?

There are some specific aspects of how charities work that may be new to you.



**We’ve put together a handy ‘at a glance’ guide that gives you an introduction into these different areas.**



Credit: Flamingo Chicks

**“It’s a fantastic volunteer opportunity to do in life, but as you’ll work with different people, be prepared to work together and compromise together, as it can be difficult at times”**

Ruth

## Good questions to ask

The 'right' questions to ask at any given time will depend to some extent on the individual charity, the time of year, or the stage it's at in its lifecycle. However, here are some questions that it is good for trustees to consider periodically.

### Thinking about strategy or new activities

- How does this help achieve our charity's purpose/objects?
- How has the world around us changed? What difference does that make to what we do?
- Who else is working in this area? Are there ways we could collaborate with them or learn from what they're doing?
- If we start a new activity, will we have to stop doing something else? Are we comfortable with that outcome, and how could we withdraw support responsibly?

### Monitoring the charity's work and its impact

- Is the information I'm being given helping me to understand what we're achieving, the progress we're making, and any things that aren't going to plan? If not, what are the gaps in information/data and how can we fill them?
- Are we achieving the outcomes we are aiming for?
- How much can we attribute 'successes' to the charity, and how much is a result of other factors?
- Can we describe the impact the charity is having? Do we have data and real-life stories that back this up?

### Making decisions

- Do we have the legal power to do this?
- Do we have the right information to make a decision on this?
- Is anything influencing our decision that isn't actually relevant?
- Do we need advice from an expert or professional adviser (including from outside the charity)?



Credit: Adamedia / Bendrigg Trust

- What are the risks of doing/not doing this?
- Do we have enough money and other resources to do/continue what we're planning? If not, how can we change that and how quickly does it need to happen?
- Do any of the trustees have a conflict between their duty to act in the charity's best interests and an interest or loyalty to someone else?

### Making sure the right checks are in place

- Do we have the policies and procedures in place that we need to meet our legal responsibilities and manage the charity well? What additional things might be needed for our specific type of charity or sub-sector?
- When was the last time we updated this policy/procedure/partnership agreement? What has changed internally and externally since it was last reviewed? How do we know how it is actually being applied and working well in practice?
- What can we learn from this situation? How are we going to change things to prevent something similar from happening in future or to respond more effectively?

- Have the actions we agreed on been implemented? If not, why not, and what might be the consequences?
- Do we need to revisit outstanding action points or change the timescales for them to be completed?

## Ongoing learning

The charity should be committed to supporting your ongoing learning as a trustee, as well as that of your fellow trustees. Some examples of the resources available include:

- Charity Commission guidance – this is the most widely used source of guidance accessed by trustees.
- An online trustee training course – for example, the Institute of Chartered Accountants in England and Wales (ICAEW) offers a six-module course to individuals who join its [Volunteering Community](#)<sup>31</sup> (open to anyone); the Society of Trust and Estate Practitioners (STEP) has also developed an online course called [The Informed Trustee](#)<sup>32</sup> for charity trustees.
- A wealth of guidance and training is available through umbrella bodies and sector organisations – see <http://trusteesweek.org/training> for details.
- Several umbrella or sector bodies provide training and resources (including at cost); these include NCVO (National Council for Voluntary Organisations), the National Association for Voluntary and Community Action (NAVCA), the Small Charities Coalition, the Association of Chief Executives of Voluntary Organisations (ACEVO), the Directory of Social Change, Civil Society Media and the FSI (Foundation for Social Improvement).
- Many charity law firms and local Councils for Voluntary Service provide free or low-cost seminars on key topics such as the role and legal duties of charity trustees.



- Other conferences and training events are available (at cost) such as the [NCVO Trustee Conference](#),<sup>33</sup> [Trustee Exchange](#)<sup>34</sup> and [Directory of Social Change conferences](#)<sup>35</sup>.
- Your charity could also arrange a bespoke trustee development day that is tailored to your charity and facilitated by an external governance adviser.



## Bringing your role to an end

The charity's governing document should say how a trustee's role may end. This usually includes:

- When they reach the end of their term – this might be a fixed period (e.g. three years), or a proportion of trustees may be required by the charity's governing document to retire each year, such as a third of trustees retiring at the AGM.
- If they have decided to resign – this might be because their circumstances have changed and they can no longer give the role the commitment it needs, or because it doesn't quite match up to their hopes or expectations. A trustee can usually resign – which should be done in writing – as long as the charity will still have the minimum number of trustees required under its governing document; otherwise, you will need to help recruit your replacement first.
- If a trustee dies while they are still in office.
- If they are disqualified from being a charity trustee under the Charities Act 2011.
- If they haven't attended meetings for a certain time period and the other trustees decide to remove them.
- If the other trustees or members decide to remove them – for example, because of a disciplinary or misconduct issue. There needs to be a good reason for a trustee to be removed and they should be given notice of the reasons why this is being considered and an opportunity to make representations before a decision is made. In practice, removal of a trustee rarely occurs. The Charity Commission also has powers to suspend or remove a charity trustee.

Thankfully, these last four don't happen very often.

### Re-election or reappointment

Trustees can usually be reappointed or re-elected for a second and sometimes third term. The charity's governing document may not impose any limits on how long a trustee can serve for or how many times they can be reappointed. However, the Charity Governance Code recommends that a trustee serves for a maximum of three terms of three years, or two terms of four years.

This makes space for new trustees who may have different skills or qualities needed by the charity, perhaps more up-to-date professional knowledge, or because it will help the charity to 'practise what it preaches'. It can also help avoid a board – and individual trustees – becoming 'stuck in their ways', tired or less attuned to the context in which the charity is operating.



A charity's governing document might specify that a trustee has to take a break from the board of trustees for at least a year after they've served a certain number of terms. This provides a timely opportunity to release them to explore new organisations or causes, or simply to take some time out to enjoy other things.

Reappointing a trustee for another term shouldn't be something that happens just as a matter of routine. Instead, both the trustee and the charity should actively consider what they still have to offer and what the charity needs for the next phase in its journey. Trustees who continue on the board when fresh skills or renewed energy are needed, are not helpful to charities – even if they are well respected and have made an invaluable contribution during their term.

When a trustee does leave, it provides an opportunity to celebrate all that they have contributed to the charity, to thank them, and to encourage them in whatever will come next for them. If a trustee goes on to become the chair this might be in addition to the time they have served as a trustee.

### Succession planning

It is also good practice to stagger when individual trustees' terms come to an end. This helps succession planning as it prevents experienced trustees all leaving at the same time, while encouraging the board to bring in fresh skills and perspectives.

### Celebrating your trusteeship

Whenever and however your first trustee role comes to an end, use the opportunity to:

- Celebrate the contribution you've made to the charity's cause
- Reflect on what you've learnt from the experience – about the charity sector, the charity, the cause, leadership and yourself



Credit: Girls Friendly Society

- Identify learning that you can take into a future role – whether that's as a trustee, professionally or in a personal context
- Rest, particularly if there have been periods during your trusteeship that you have found challenging or stressful
- Plan what you want from your next trustee role and what you can take from these recent experiences
- Stay connected to the cause and relationships that have impassioned and encouraged you in your trustee role and beyond.

### Looking for a fresh opportunity

Many people get the trustee bug and become serial trustees – moving from one trustee role to another when they reach the end of their term or after serving for a few years on one board. What you look for in a trustee role may change over time and it's worth giving yourself some headspace to reflect on what you've enjoyed about the role at a particular charity, to revisit whether your motivations have changed, and to reassess what you're looking for in your next role. You might choose to take some time out, but we hope you'll be enthused to seek out a new trustee role before too long.

### A final note from me

Like many people, I wasn't looking for my first trustee role, but it felt like the right opportunity when it came along – I actually laughed when it was suggested, as I thought they must be joking!

Unlike many people, I was 24 and only just starting out in my career – 14 years later I'm onto my second trustee role, having moved from a small, local charity to one with a £7.5m income that works in around 30 countries.

Despite a career in charity governance and regulation, I still suffer from a touch of 'imposter syndrome' in my trustee role. I'm genuinely blown away by the skills, experience and leadership qualities of both our staff team and my fellow trustees.

But I also see that, like all of them, I bring something unique to the table. No one else has lived the specific experiences I have, gained the knowledge that I have in quite the same way or walked in the shoes that have taken me on my leadership journey. So, no one else can bring the perspective I can.

Both trustee roles I've had have given me some incredibly rewarding and challenging experiences and have taught me a huge amount – including about myself. I realise I've learnt a lot from others, but much longer-serving trustees have also learnt from what I have contributed.

It is a genuine privilege and a real responsibility knowing that decisions you make with other trustees can be life-changing and life-saving. Some of the things we have to think about are tough – and so are the stories of many of those we work with. But there is also a lot of laughter and fun, including for those we support.

Managing my trustee role alongside work and other commitments can be tricky sometimes, but seeing the amazing work the charity does is a fantastic motivator. I was appointed (in part) because of the professional skills I have, so I'm challenged to think about how I can use them for the charity and have an opportunity to develop professionally in a non-work context.

The effort I put in is nothing though, compared to what I gain from it. It is a very humbling and rewarding experience to realise that my small contribution has added value and helped the organisation to function just that little bit better, producing even greater impact for our beneficiaries.



Lynn Cadman,  
author of this guide for  
Getting on Board,  
November 2020

Credit: Heathrow Community Trust/  
Royal Brompton Hospital

So, go on –  
what's stopping  
you?!

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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  
Students Association

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