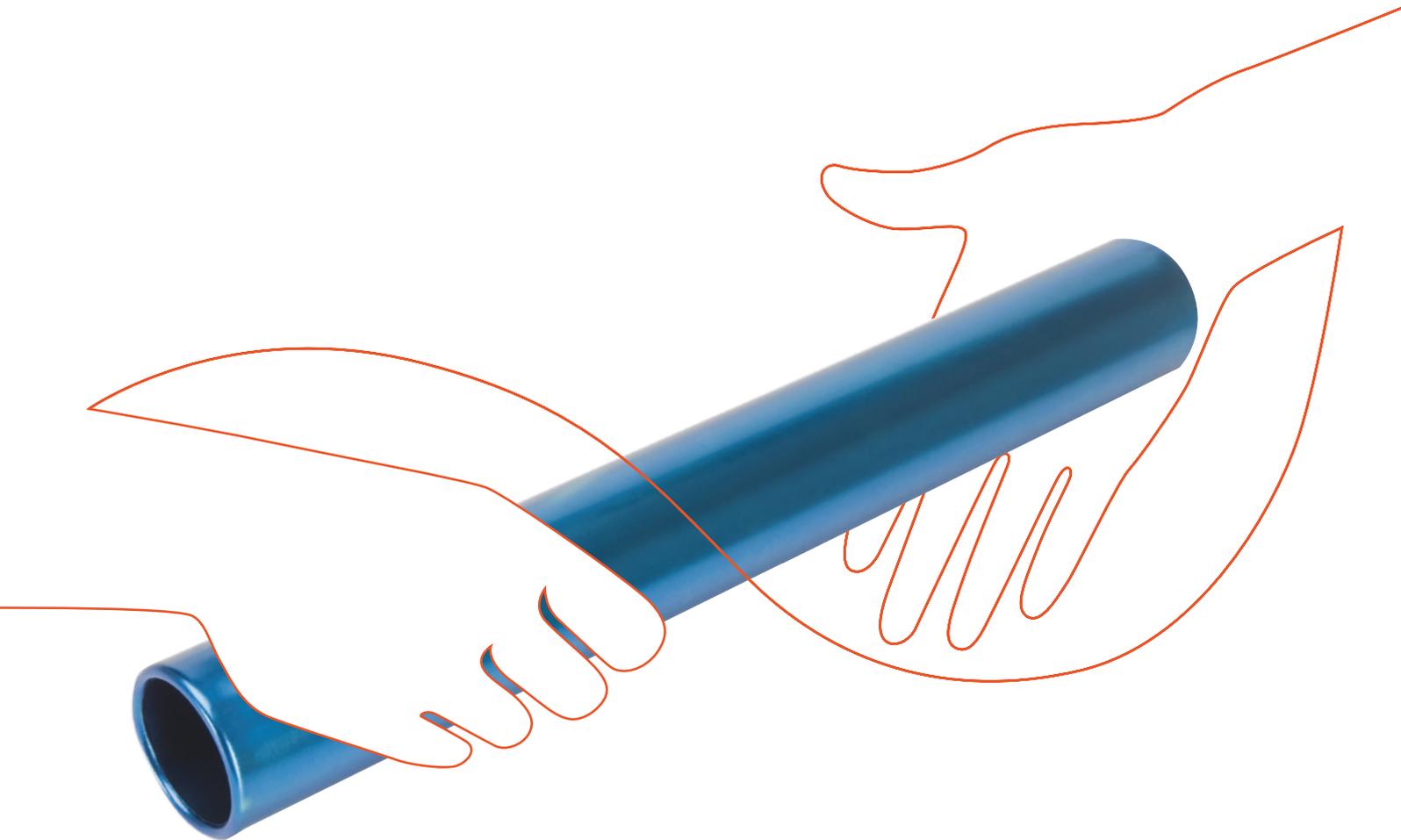


YOUNG TRUSTEES GUIDE

Developing the next generation of charity leaders

August 2015



Contents

1	Introductions	3
2	Young trustees – the current landscape	5
3	The benefits of young trusteeship for charities and young people	7
4	Recruiting young trustees	9
5	Challenges and solutions	12
6	Thanks	20
7	Further examples and case studies	21

1 Introductions

Charities Aid Foundation (CAF) launched the Growing Giving campaign in order to secure the future of the charity sector and from the very start we realised it was vital to get young people to engage with charities – through volunteering, raising and donating funds, and in leadership positions such as serving as trustees of a charity.

The role of trustees is often overlooked, but the contribution they make through the giving of time, expertise and perspective is essential to ensuring our charities are well run, and able to take action in pursuit of their charitable mission. Evidence showing the average age of a trustee is 57, although predictable, is extremely worrying, and charities need to take action to get more young people involved in strategic decision-making roles.¹

Charities that already have young trustees benefit from their different perspective and views, which can lead to better governance. Those young people benefit too, through the opportunity to develop their skills and knowledge, and serving as a trustee gives an individual an excellent way of demonstrating their dedication to a campaign or cause.

The purpose of this guide is to encourage more charities to take on young trustees, or at least put in place programmes giving young people the relevant skills that they will need for future service as trustees. This follows the recommendations emanating from the Growing Giving Parliamentary Inquiry, where a cross-party group of MPs urged charities to help young people access leadership roles. This guide also provides tips to overcome the challenges faced by young people who are interested in becoming trustees.

The reason that this is so important is because young people today are the charity leaders of the future. Giving them experience in trustee roles now will make sure that the UK's most beloved organisations are in safe hands in the years to come. There's no doubt that young people are an asset to the sector; we hope that this report will help to increase the prevalence of young trustees in the years ahead.



Dr John Low CBE, Chief Executive
Charities Aid Foundation

I am delighted to have collaborated with CAF to write this guide. I have been a trustee since I was 18 and it is fantastic of CAF to offer the space to share some best practice ideas to calm nerves and encourage the sector to feel confident about appointing and engaging with young people. Yes, you will have to work slightly differently, but largely young trustees are no different from their older peers. This is about sharing experiences and learning to empower young people.

In this guide we set the national context, introduce the benefits of young trustees, highlight the problems young trustees often encounter and offer some examples of how other organisations have dealt with these challenges.

Obviously, this collection of case studies is not a definitive guide. I would encourage all of you reading this to continue to innovate and to create additional best practice. And, as with all types

1 www.trusteesweek.blogspot.co.uk/p/trustee-facts-and-figures.html

*Young people
today are the
charity leaders
of the future*

of innovation, continue to learn and embrace failure – it is OK if you have to revisit your model of engagement and if you have to adapt slightly. The fact you're thinking about it is a fantastic start and I realise that it may be a venture into the unknown for some of you and so we wanted to provide a resource to guide you through that journey.

To any young person reading this, I wish you the best of luck as you start on your journey. Trusteeship is an immensely powerful way of getting involved with charities. You will contribute to so much and you will learn even more. If you are the first young trustee in your charity, then you have an extremely exciting opportunity to prove that engaging young people is a brilliant idea.

Leon Ward, Trustee, Plan UK and Brook, @LeonJward

'A board's strength lies in its collective skills and perspectives. To understand the charity's beneficiaries properly and serve them effectively, it needs a diverse range of people from a variety of backgrounds and experience. Trustees should particularly consider the benefits young people can bring to the boardroom such as new talents and a fresh perspective. In return, trusteeship is an excellent way for young people to learn new skills and progress professionally. These issues are central to the Trustees' Week campaign, spearheaded by the Charity Commission and a wider partner group. I encourage those who are considering trusteeship to get involved and read our guidance for more information – and if you're already on a board, start thinking outside the box more when recruiting; what could take your charity to the next level?'

Paula Sussex, Chief Executive of the Charity Commission (for England and Wales)

'We recognise that diversity among those running charities is a key aspect of good governance, ensuring that the charity can draw upon a wide range and appropriate mix of skills, experience and perspective. This was our key theme during Trustees' Week 2014 and it's one we are continuing to develop in Scotland. It's telling that the average age of a charity trustee is 57, so there's a real opportunity for your trustee board to actively mentor the younger people in your organisation, and encourage those in the wider community to get involved in voluntary work. It's an investment in the charity leaders of the future – and it's never been more critical when we consider both the positive impact and increasing demands placed on the sector. We welcome CAF's report and encourage all those involved in the sector to read it and reflect on how its principles can be applied in the running of their charities.

David Robb, Chief Executive of the Scottish Charity Regulator

"While being a trustee is a responsible and often challenging role, it is also extremely rewarding, particularly for those who are looking to build their knowledge and experience within a vibrant and diverse sector. With many young people struggling to get onto the career ladder, trusteeship can offer a way to learn new skills, gain professional experience and ensure their voice, and the views of their counterparts, are heard at a strategic level. Simultaneously, charities themselves benefit from the talent, passion and thinking of a new generation who are keen not only to learn but to make a real difference within their community and further afield. I would encourage all charities to look at the potential a diverse trustee board, with representatives from a range of backgrounds, age groups and experiences can bring."

Frances McCandless, Chief Executive of the Charity Commission for Northern Ireland

2 *Young trustees – the current landscape*

In 2014, the cross-party Growing Giving Parliamentary Inquiry produced a report which included recommendations designed to protect the future of the charity sector. One of the recommendations calls for the creation of a programme for young people to shadow charity trustees, in order to give them the skills and confidence to step into roles in the future. Additionally, the Inquiry called for larger charities to provide opportunities for young people to become trustees, acknowledging the importance in engaging with new audiences at an early age. This is already happening at many charities across the country and this guide includes some of the best practice that we have heard about.

Trustees play a very important role in the way that charities operate in the UK, and oversee that each organisation is doing what it was set up to do. This includes making sure that charities follow the law, run their finances and budgets correctly, spend money sensibly on activities designed to support their beneficiaries and service users, and make decisions about the goals that the charity is trying to achieve.

18-24 year-olds account for less than 0.5% of all charity trustees

Having a good and effective board of trustees benefits both the organisation itself, but also the people who give up their time to get involved in the oversight of a charity's administration; it is a different way of 'giving' to organisations and provides opportunities to develop skills and knowledge. A vibrant charity sector should include people of all backgrounds in positions of responsibility and influence. Diversity, in all of its aspects of gender, race, sexual orientation, socioeconomic background, disability and faith and belief, is something the charity sector should embrace and champion. Often, organisations don't live up to their own rhetoric around inclusivity and a belief in equality.

At present, trustees in the UK are not representative of the population, with both women and BME communities dramatically under-represented on trustee boards. Only 8 per cent of trustees are non white and only 36 per cent of trustees are women.² One of the areas where charities are least representative is the category of age. In short, boards of charities are dominated by older people. Despite making up 12 per cent of the UK's population, 18-24 year-olds account for less than 0.5 per cent of all charity trustees.³ Fewer than 2 per cent of charities actually have a young trustee serving on their board.⁴

Of course, that means that older people are dramatically over-represented on boards - two thirds of charity trustees are aged over 50. Whilst it is essential to involve trustees with a wide range of relevant skills, professional experience and expertise, there are disadvantages created by an over-reliance on older people:

- 1 There are genuine concerns about representation. People of different ages see and experience the world differently, and the dominance of older people as trustees means that charities are failing to gain proper insight into the diverse views and perspectives held by people of different ages, including their beneficiaries and donors.
- 2 It means that young people who could become trustees aren't able to gain the skills and experience that comes from serving a charity in this way. We'll look at the benefits that come from trusteeship in more detail later, but young trustees gain a number of demonstrable skills that can help boost their employability. A failure to provide them with chances to serve means missing out on opportunities to develop those skills and reduces the potential talent pool that the sector can draw from both now and in the future.

2 www.thirdsector.co.uk/diversity-deficit-top-biggest-charities/management/article/1308999

3 CAF, 'Mind the Gap' (2012)

4 Charity Commission, 'A Breath of Fresh Air' (2010)

- 3 It is important for the charity sector that young people are developing the leadership skills and experience required to lead charities in the future. It's also vital that young people get involved with charities working in a variety of fields. At present, young trustees are primarily serving charities that specialise in education, or have children or young people as their main beneficiaries.⁵ Broadening the experience of young people can help the organisation deal with the strategic issues it is facing and the skills and perspectives of younger people will be relevant to all organisations, not just those which have an obvious focus on young people or education.

85% of people aged under 35...would consider becoming a trustee

In terms of the number of trustee vacancies, there are plenty of opportunities for young people to apply for and take up a trustee position. Do-It (who provide an online national volunteering database) report that they have 3,000 trustee roles listed at any given time on Do-it.org and other organisations report that they have hundreds of trustee vacancies. For example, Career Volunteer report that their new webpage www.careervolunteer.co.uk currently has 150 trustee vacancies, which they expect to grow to 500 opportunities, while Reach Skills have reported that they advertise an average of 400-500 vacancies on www.reachskills.org.uk

We also know that there is an untapped source of enthusiasm, as research shows that 85 per cent of people aged under-35 state that they would consider becoming a trustee.⁶

But, and this is true for all ages, one of the main challenges is that people don't know how to go about becoming a trustee. Charities themselves don't always give enough consideration to the benefits for their organisation associated with having young people involved at trustee level. Increasing awareness of the opportunities for young people to become trustees and the benefit that both they and their organisation can gain from this can only encourage more young people to get involved in the running of charities.

5 Charity Commission, 'A Breath of Fresh Air' (2010)

6 www.pilotlight.org.uk/blog/whats-the-benefit-of-young-trustees

3 *The benefits of young trusteeship for charities and young people*

So, what are the benefits of increasing the number of young trustees?

In 2014, CAF and Leon Ward carried out the Young Trustee Survey, designed to find out a bit more about the experience that current and former young trustees aged between 18 and 30 have, and how they benefit from their position. Our aim was also to discover how different charities give young people the chance to serve in trustee and leadership positions, and the impact having a young trustee can have on an organisation.

For charities

Evidence provided by a range of organisations highlighted the following benefits:

- Challenging a disconnect that can exist between board members and beneficiaries, as a diverse range of trustees can help ensure that a charity is fair and transparent in their operations and is providing appropriate services, communications and staff support
- Increasing public confidence in an organisation by having a range of people represented on their board(s), which can encourage greater support from the public
- Diverse boards benefit from a greater range of skills and viewpoints which can result in increased flexibility, greater scrutiny and better informed decision making – a diverse board leads to more robust decision making
- Young trustees are often hungry to learn and make a difference – when given confidence, they may also ask the question others won't⁷
- Engaging young people as trustees means charities are making friends for life and will build a constituency of both future and loyal donors and a network of advocates
- It is a chance to be equitable and to support a section of society in a way most charities have not thought about
- Charities often make the case for a more inclusive society which values people and reflecting this at the highest decision making level in a charity is a really positive way of demonstrating and living this value
- Strategically, having a more diverse trustee board that has young trustees helps with succession planning, both within the executive and on boards
- Charities can benefit from the expertise and guidance of young volunteer trustees in ways that they otherwise would have to pay for
- Young people represent a significant proportion of the population, and a diverse board that utilises the talents and skills from a range of people with different experiences is more likely to be well equipped to spot potential challenges and plan positively to engage a wider audience

Comments from charity trustee board chairs who responded to our Young Trustees Survey about the benefits of having young trustees include:

(They provide) “insight into the experiences of young people in the UK”

(They ask) “very obvious and insightful questions that can change the course of discussion”

“making papers more accessible, which is of benefit to everyone”

“new fresh ideas challenging long standing beliefs and systems”

“energises the committee to think differently”

“a fresh point of view”
“common sense approach and optimism”
“imagination and ideas”
(They) “ask the stupid questions that ensure robust decision making”⁸

Charities have a responsibility to ensure that new trustees are prepared for their new role, so it's important to make sure that young people who are keen to become trustees are provided with a full briefing about what trusteeship actually entails, and how they are able to use it as a developmental opportunity. All trustees should consider training where it may of benefit to them, regardless of age. Charities that put in place programmes and schemes to get more young trustees now and in the future will reap the benefits of their commitment.

For young people

Young people can help make positive change to people's lives, gain new skills, develop existing ones and participate in experiences that can support their future career goals. For instance:

- Using an opportunity to give something back or support a cause that they care about and make a difference to a charity
- Developing new skills such as overseeing a budget, helping develop the strategy of an organisation and holding management teams to account
- Networking, including the opportunity to interact with, work with and learn from senior leaders and representatives from different sectors
- Enhancing their CV, showing a commitment to extra-curricular activities and boosting their employment and education chances
- An opportunity to contribute to areas charities can sometimes struggle with, including: designing new fundraising products for a younger audience, using digital, campaigning and communications work

As you can see from the comments below, young trustees are overwhelmingly positive about their experience and keen to show how it has helped them to develop:

“learned a lot in a short space of time”
“made great connections”
“gave me confidence in job interviews about my experience”
“contributed to setting priorities and seeing positive results emerge”
“gave me valuable skills and experience that I can take back to the workplace”
“learned what it takes to run an organisation and making the key decisions”
“networking opportunities”
“I get to help a college become more successful and offer more and better learning opportunities for adults”⁹

Young people are often wrongly dismissed as disengaged members of society. That just isn't true. The findings of the Growing Giving Parliamentary Inquiry show just how interested young people are in making the world a better place, and being a charity trustee gives young people the opportunity to change the world whilst boosting their own life-chances too.¹⁰

8 These comments come from responses to CAF's Young Trustee Survey, carried out in 2014.

9 These comments come from responses to CAF's Young Trustee Survey, carried out in 2014.

10 CAF, 'Creating an Age of Giving' (2014)

4 *Recruiting young trustees*

Responsibility for recruitment of new trustees lies with the existing trustees, who must oversee the management of an open and effective process and act in the best interests of the charity. In order to do this, existing trustees should be clear about the purpose and aims of the charity as well as detailing their duties and responsibility as trustees. Carrying out a skills audit is usually the best way to identify what talent is missing from a board. When recruiting trustees it is important to take into account their potential as well as experience, as many young people need the opportunity to develop in a role. Fundamentally, boards act in a collegiate and consensual style, so appointing someone who has not clocked up years and years of experience will not be detrimental. In fact the opposite is often true; those with a lack of knowledge usually ask the most clarifying questions – and that is often to the relief of other trustees!

It's crucial that charities look at what they can do to actively engage more young people to become trustees. When asked, the two most common answers from young people as to how they could be encouraged into trusteeship positions were that charities should help improve understanding and awareness of the role of trustees and "that they should advertise, publicise and promote the role and vacancies."¹¹

recruiting a new trustee offers a great way of communicating with new audiences

One of the challenges of diversifying charity trustee boards that the Charity Commission has identified is that most trustees are appointed through a word of mouth or personal recommendation.¹² While this is not always a bad thing, using this as the primary method of appointment means that the pool from which trustees are drawn is narrow and limited to the social networks of existing trustees. Such a narrow pool of recruitment makes it unlikely that a charity will be able to recruit the best people for their board. Remember, recruiting a new trustee offers a great way of communicating with new audiences – it would be foolish to ignore vast swathes of the population and not engage with young people.

Suggestions for recruiting new trustees:

- 1 Undertake a skills, knowledge and diversity audit of your current trustee board and identify what gaps you would like to fill.
- 2 Create a role description outlining expectations of what is required of a trustee including time commitment, location and dates and times of meetings that have been set. Include the fact that you welcome applications from under-represented groups on the board such as people under the age of 30 and the key skills or knowledge deficits you are looking to address.
- 3 Think about why someone would be interested in serving as a trustee for your charity and write an advert that communicates this effectively and in a way that is accessible to potential trustees.
- 4 Prepare an information pack for candidates with the relevant governing documents, accounts, trustee biographies and other useful information, provided in language that is accessible to a range of audiences. You could include a video clip of the chair, the CEO and one or two other board members to bring this pack to life; talk about the challenges, the successes and the next steps for the organisation. You may also want to make the chair (or chair of the recruitment panel) available for informal chats.

11 www.theguardian.com/voluntary-sector-network/2013/sep/24/young-people-charity-board-trustees

12 www.gov.uk/government/publications/finding-new-trustees-cc30/finding-new-trustees#4-6

- 5 Plan an induction for new trustees ensuring that they have the opportunity to meet staff and find out about key projects and services at an early stage.
- 6 Offer formal or informal mentoring by a fellow board member to a new trustee to make it easier for them to have a point of contact for questions about their new role, and to provide guidance about issues that may arise.
- 7 Whether you appoint or not, offer feedback. Ours is a sector that values people; providing feedback to those who have given up their time will support them with future applications and endeavours.

It is important that recruitment for trustees does not only rely on word of mouth, and vacancies should be advertised on websites such as Do-It www.trusteefinder.org.uk and the Charity Jobs website www.charityjob.co.uk/ where possible. It is also wise to use social media networks that young people are likely to engage in such as Twitter or Facebook. There is also a Young Charity Trustees LinkedIn group (you simply type 'Young Charity Trustees' into the groups page on LinkedIn to find it) on which you can advertise.

It can be really encouraging for potential young trustees if you can make it clear from the outset that they will not be out of pocket and if you make it clear that you are able to reimburse expenses or indeed that you can book travel in advance where appropriate, as some young people may not have the cash means to pay for travel associated with meetings.

You can use social media to promote the role and ask organisations that have young people as their primary beneficiaries to spread the word.

Relevant organisations might include: Girlguiding UK, The Scouts, the British Youth Council, Young Charity Trustees or the National Union of Students (NUS). In Wales there is Youth Cymru, Children in Wales and the Wales Council for Voluntary Action (WCVA). In Scotland, Young Scot and the Scottish Council for Voluntary Organisations (SCVO) should be able to help and in Northern Ireland, The Northern Ireland Youth Forum would be a good organisation to contact.



Case study from the National Children's Bureau (NCB)

"Since 2001, young representatives have provided a voice on the NCB Board of Trustees. In 2014 two trustees, Thivya Jeyashanker and Page Nyame-Satterthwaite (both age 19) were appointed to enhance the diversity of trustees' age, skills and knowledge.

As Chair of NCB, I have seen firsthand the benefits that the voice of children and young people bring to a Board meeting and to our governance structures. As NCB works with children, for children I was keen to enshrine this voice in our constitution and at the heart of our strategic decision making processes.

The young representatives and trustees are supported by the Head of Participation and Company Secretariat, including a briefing prior to each meeting and time with the Finance Director, to gain full confidence in their understanding of papers and development their skills. Additional support is provided through a trustee acting as participation champion. Trustees sign up to a participation pledge to aid respectful, fully inclusive meetings.

Our young trustees come with a diverse and representative range of perspectives and viewpoints to ensure that any decisions that are made have given due consideration to those that will be affected by them. They have provided a valuable challenge in discussions, offering new solutions to time old problems and have brought a fresh approach and new ways of looking at a whole range of issues.

The process of including young trustees on our Board has been invaluable and worth the effort, I look forward to watching them develop within their roles and as individuals across their terms in office."

Elaine Simpson, Chair of NCB Board of Trustees

"Being a young trustee on the NCB Board has been an excellent experience. The support before the meetings ensures that I understand the content and organisation of the meeting. This has been very useful as I feel informed and capable to contribute confidently to the discussion of papers, especially the financial aspects due to the meeting with the Finance Director.

This is beneficial to the entire Board, because as young trustees, we often have information about the activities of YNCB (the under 18 NCB membership) that is relevant to the Board papers and the organisation as a whole. In this way, the young trustees are able to contribute their experiences with the young membership, which is valued by the Board, just as the other trustees contribute their experiences.

In the meetings, the young trustees and young representatives report the participation paper to the Board and this has also helped to make sure the young trustees are a core part of the meetings, along with participation pledge that all trustees signed. As a result of developing my skills and the support as a young trustee I can perform and enjoy my duties as trustee with confidence."

Page Nyame-Satterthwaite, NCB Young Trustee

5 Challenges and solutions

Time and availability

Young people may have fewer opportunities to be flexible with their time as result of often being more junior in their workplace, or dealing with challenges of balancing work (often young people are in jobs that do not allow flexible working, the chance to leave 10 minutes early or additional days for voluntary work) and study. It is important to make sure that young trustees are not put in a position where they have to prioritise their role over their career or education, and charities should ensure that trusteeship is not associated with onerous demands on time and resources.

Respondents to the Young Trustee Survey in 2014 explained:

“You have to be prepared to accommodate their availability (ie, less time during exams but more during the holidays) but this applies to all volunteers in one way or another”

“Time is the biggest setback for our young trustees and representatives. As the majority of meetings take place during the day, time doesn’t allow young trustees to attend events due to other commitments whether it is their full time job or education”

Step Up to Serve, a youth social action charity who responded to the survey, explained that they:

“Give as much notice as possible with any board meetings/events so that [young people] can try to plan around it especially when they have so many other commitments. We give extra support in managing their commitments and making sure they are briefed properly in a timely fashion. We follow up with feedback from any meetings/events they attend and contribute to in order to keep helping them develop.”¹³

The onus is on charities to be as flexible as possible for all trustees.

Solutions

For charities

- Organise board meetings at times that are convenient to as many of your board members as possible and consider holding them at different times so that trustees who cannot attend one particular meeting are not excluded.
- It is good practice to ask all board members about their availability before setting the board meeting dates, which will allow you to assess which days and times would be most optimal for most board members. You can use the online (and free) Doodle tool to ensure you choose the optimum date for as many of your board members as possible.
- It is important to be clear in setting expectations about time commitment for board meetings in addition to any other time requirements outside of board meetings when you are advertising for trustees and at any interview stage; be realistic, be honest and be upfront. Step Up to Serve has a bursary scheme so that young people can claim back wages they have lost because they have been at board meeting.
- Another thing to consider is that young people may not always have access to printers, so you may need to post papers out or print them for trustees before the meeting.

13 Young Trustee Survey 2014 respondent

For young people

- It is important that you find out what time you are expected to commit to board meetings and other activities when you first enquire about becoming a board member.
- Getting information about dates of meetings in advance can help you notify your employer or education provider, and help make sure that you can get the necessary time off. In addition, make sure you let your fellow trustees know your availability, so that meetings can be scheduled to allow you to attend as many as possible.
- Be clear about the times of the year that are busier or quieter for you, and your preferred times. Just because something has always been done a certain way doesn't mean it can not be changed to reflect the needs of the current board members.
- You should also factor in the time it will take you to read the board papers, ask questions about the papers and other duties you may take on as a board member such as representing the charity at events.

Awareness of what trusteeship entails

One of the greatest barriers to young people putting themselves forward as trustees is the knowledge that it is something they can do in the first place.

"The biggest setback I had is understanding the role of a trustee. In this instance it's less about supporting young people and more about how we as a board have approached development."

"They don't understand it [the concept of trusteeship] compared with all the other participation opportunities they have"

"Retention has been an issue...because the responsibilities and importance of the role aren't communicated properly"¹⁴

Solutions

For charities

- New trustees need to feel welcomed, informed and involved, and you need to make sure that you are communicating information about the role of a trustee and your organisation's objectives at every stage and in language that is accessible – prior knowledge of the role of a trustee should not be presumed.
- Ensure that an induction and mentoring are offered to new (and indeed all trustees). Inductions should include the opportunity to meet staff and find out more about the work being undertaken by the organisation.
- If you offer mentoring to new trustees you should ensure that the board member who offers to be a mentor understands and is fully committed to their role in helping their mentee navigate both the structures and culture of the charity.
- Plan UK have co-opted members of their Youth Advisory Panel elected to sit on the board; they get access to all the papers, come to all meetings and actively contribute. The only thing they cannot do is to vote. But this continued cycle of 'observers' allows Plan UK to prepare a pool of future young trustees who have a better and deeper understanding of the role. They then often have the greatest breadth of knowledge of the organisation of anyone on the board!

14 Quotes from respondents to the Young Trustee Survey 2014

For young people

- Taking on the role of a trustee is an excellent way to take responsibility for something you care about, but it is important that you feel comfortable and understand the role you are taking on.
- Much understanding of governance (i.e. the way that things work, how decisions are made and the thread of accountability that runs through the organisation) is something you learn as you do it, but having a good introduction to the principles and rights and responsibilities will equip you to make decisions that you are most happy with, and provide input at an early stage.
- Do your research about the charity and its objectives so you are clear about what it is you will be working to achieve in the role. If you find a trustee vacancy that you think is interesting but there is not much information about it available online, you can contact the charity by phoning or emailing to find out more about the organisation and what they are looking for specifically.
- Remember that any appointment process should be a two way conversation, and the questions that you ask the current trustees about the organisation and their expectations are just as valid as the questions they are asking you.

Legal liability

The issue of young people not understanding the role of a trustee is likely linked to the fact that potential trustees may also be intimidated by the prospect of being legally liable for any issues that may arise whilst serving as a trustee. Ian Joseph from Trustees Unlimited says charities should be candid about responsibilities and rewards involved but also about the risk.¹⁵

“One of the biggest barriers to people wanting to take on a trustee role for the first time is the fear of legal responsibility, of being liable for failure. When promoting trusteeship opportunities we shouldn’t shy away from explicitly assuaging this fear. The benefits of being a trustee at a younger age for both the individual and the organisation are something to be celebrated and the taking on responsibility (rather than liability) is great for personal development.”

The Charity Commission offers guidance to charities and trustees on both legal requirements and best practice to help you prevent problems arising and ensure you can make the best decisions for the charity.

Neal Green, Senior Policy Advisor at the Charity Commission, said:

‘Trusteeship is a fantastic opportunity for young people to develop skills that can benefit them in their careers. It’s a unique chance to work at a strategic level of an organisation, making decisions that will impact its future. Trusteeship is a responsibility; trustees are responsible for the running of their charity, and people will look to them if things go wrong. But the most important thing is to make sure they understand and carry out their duties. Charity law generally protects trustees who act honestly and reasonably. Read our guidance on trustees’ responsibilities to find out more.’

The Commission guidance states that while trustees may be personally liable for any debts or losses the charity faces, personal liability of this kind is rare and trustees who have followed Commission requirements will generally be protected. More information about liability can be found in the Charity Commission document ‘The Essential Trustee: What you need to know’.

¹⁵ www.theguardian.com/voluntary-sector-network/2011/aug/23/trustee-of-charity-legal-responsibility

Solutions

For charities

- Make it clear that taking on responsibility for an organisation is a positive thing to do and that being engaged in an organisation means having the opportunity to build skills and develop knowledge that can give young people a significant advantage in the job market.
- The responsibility that comes with serving as a trustee should be seen as a developmental opportunity and explained to young people as a positive feature that comes with taking up a serious position. You may wish to consider organising external training for all trustees (there are lots of courses available such as the ones provided by NCVO and the Small Charities Coalition) to help them understand and manage the responsibility of their role.

For young people

- One of the great things about being a trustee is that you get to make decisions that shape the direction of the charity and it gives you the opportunity to make a real difference to people's lives. With almost any responsibility there will be a risk attached.
- If you are not happy with or disagree with a decision you should ask to have your disagreement noted in the minutes. Equally, if you do not agree with a decision or have any ongoing concerns you should speak up and make sure your voice is heard!
- It may be helpful for you to take the time to learn about the different types of charities and what responsibilities come with being a trustee of different types of charities.

Engagement across multiple areas

Younger trustees may be less likely to have experience in dealing with organisational finance and strategic planning than someone who is at a senior level in their career, since similar responsibilities in paid work tend to be part of job roles in management and executive level. However this does not mean that young people don't have anything to contribute to this process - they almost certainly do - but it means that boards cannot rely on assumptions about levels of knowledge, and will need to re-think the ways that they present information or drive processes to make sure that all trustees are able to engage.

“We struggle to engage young directors (another term for trustees) in areas which they feel inexperienced in such as governance or finance but they have engaged well in areas such as Human Resources and recruitment”

“Although board meetings are fairly informal they are often focused on fairly 'dry' matters – reviewing policies and procedures, etc, as well as long term strategic planning. We have found that they are not very exciting for youngsters and that they tend to be far more interested and engaged in operational planning and decision making which is largely delegated to staff”.¹⁶

¹⁶ Quotes from respondents to the Young Trustee Survey 2014

Solutions

For charities

- Consider the way in which these 'dry' areas are presented at board level. You should always present the information in an accessible way that helps all trustees understand the topics being discussed. For example, you can ensure that financial tables are accompanied by explanations of the wider trends and any significant changes to figures.
- It may also be prudent to offer trustees financial training as standard; whilst also acknowledging that not all trustees around the table are accountants or financial experts but that they (at least should) have a general understanding of the numbers and their meaning.
- Beginning each section of the agenda with a verbal summary of issues and considerations can help make sure that all trustees are able to take part in subsequent discussions.
- With respect to understanding governance, you can train trustees and should give them an introduction to how your charity works but often governance experience is something that develops naturally over time; especially as governance models vary from charity to charity.
- During the induction process you should check with new trustees to gauge their level of understanding so that if they need more support you can offer them it. Critically, if they go through the first two meetings not fully understanding every agenda item, that is ok and typical of all trustees not just young ones!!

For young people

- Remember, you are not the only one who doesn't understand all of the papers! Every time you ask a clarifying question about an element of the papers there will be another trustee in the room that gives a silent sigh of relief. For some reason, as people get older people they seem to fear asking for help or clarity. That is dangerous because you are responsible for ensuring you understand the issues you are making decisions on. Ask away!
- If you have quite a few questions and feel nervous about asking so many questions during the meeting it may be easier for you to speak to the chair or another board member in advance, so that you can understand as much as possible before the meeting itself. However, remember it is your responsibility to make informed decisions so if you are still not clear on a point, you should not feel embarrassed or intimidated about pushing for further explanation.
- Don't be afraid to get stuck into areas you don't yet have experience of, you learn about governance by being involved in it. Not all trustees have to be an expert in every area. Boards usually have at least one or two people with experience in the financial and legal professions, so they have an expert opinion on these matters. A basic understanding is all you need; the complexities that arise will throw many trustees off balance and will usually be accompanied by a full explanation from the staff and the trustee that leads on the relevant area.
- Ask questions and take the opportunity to learn. Remember that you have a right and responsibility to do both!

Being valued

Due to the extremely low numbers of young people represented on trustee boards it is perhaps unsurprising that other trustees, organisations or beneficiaries may not expect a trustee to be under the age of 50. Unfortunately this can translate to young trustees feeling that they are not taken seriously or as respected as the other trustees. This is not acceptable, and it is the responsibility of the other trustees and senior staff to ensure that all trustees are treated equally and fairly in their role.

“Sometimes other organisations are surprised that they are dealing with a young person at this level and need reassurance that they are authorised to make the decisions they are empowered to make”

“It is important to remember participation should always be meaningful so that young people’s lived experiences can be heard.”

Solutions

For charities

- In order to prevent age related prejudice, it is important that the board has a firm commitment to the benefits of being diverse and utilising the skills and talents of all members regardless of their age. The board must also be confident about communicating this value as a measure of competence.
- If a young trustee is treated as less important than other trustees it is the responsibility of the board to challenge this and make clear that all trustees should be able to contribute equally.
- By introducing ways to make the running of board meetings more accessible to all board members, you can prevent your young trustees from feeling patronised and can help encourage your other board members to be more engaged.
- You should also remember that once they are trustees, young people have a right to be involved in all board issues, including recruiting new trustees, new chairs, new CEOs and the right to sit on steering committees. It can be empowering for young trustees if you encourage their participation or even suggest they sit on any of those projects.

For young people

- If you don’t understand something, ask! If you feel like you don’t understand the papers it is important to speak to another board member and ask someone to help you work through them.
- If you find the papers or information being presented don’t make sense, ask for explanatory notes to be included and/or ask for the information to be presented in a different way.
- Remember that part of the executive’s role is to serve trustees (although this does have its boundaries!)
- One way you could get more out of board meetings is to ask the chair of the board or another member, like your mentor, to spend some time with you before the board meeting so that you can ask questions before the meeting itself.
- Always set yourself time before the day of the meeting to go through the papers that you’ve been provided with, as it will make it easier to ask questions in advance. The decisions you are making are important and the more time you give yourself the easier it will be for you to consider the options and be comfortable with your decisions.

Case study from the Sheffield City Trust

Roscoe Hastings, who is a Young Trustee at the Sheffield City Trust, reflects on the governance review he carried out for the Sheffield City Trust:

“Sheffield City Trust (SCT) and its subsidiaries have operated sports, leisure and arts facilities for the public’s benefit for over twenty years. SCT is a charity and was established to operate the World Student Games facilities.

In January 2014 the Chair of the Board of Sheffield City Trust during the annual trustee review meeting asked me to undertake a review of the Trust’s corporate governance and to report my findings to the Board by September. Good governance is a vital part of how charitable, voluntary and community organisations operate and are held accountable. As Sheffield City Trust (and the Group) works for the public benefit, it is prudent that the Trustees should regularly review the governance of the Trust in order to ensure that its governance and management is fit for purpose. This was especially timely in light of a number of recent changes to the structure and operation of the charity’s work; in addition given the current economic climate it was vital for the Trust to demonstrate good and cost-effective governance.

The Terms of Reference for the Governance Review were agreed between the Chair of Sheffield City Trust, the Chief Executive, Company Secretary and myself and were approved by the Nominations and Corporate Governance Sub-Committee (NCGC).

I conducted a review of the Group’s governance in line with the Terms of Reference that were agreed. This included a number of individual meetings with Trustees and Executives as well as research with other charitable trusts of a similar size and scope. Based on these consultation meetings and best practice within the sector thirty-seven recommendations for change were presented to the Board for consideration and approval. Of the thirty-seven recommendations made by me, thirty-one were accepted and implemented in full with six others being considered over a longer period and will be reviewed again in 12 months by the NCGC.

From the start I felt confident and able to undertake this extremely large task; I was empowered and encouraged by the Chair of the Board, Chief Executive and the Company Secretary. At no time did I feel inferior or as if I was not the right person for the job. Each of the Trustees and staff members who I talked to during my Review did not treat me as ‘the young person’ but I was an equal and with a mandate from the Board to undertake this work.

Ultimately the Review benefited from being led by me as I was a relatively new Trustee so not clouded by the existing structures or doing things the way they had always been done. I was also able to bring in a different perspective being the Board’s first young trustee.”

Fear of looking stupid

While no-one likes to admit they don't know what is happening, young trustees can be at a disadvantage if they have less experience of organisational structures and processes than older trustees, who may have had longer careers. This can mean that younger trustees are less familiar with structures and processes, and it is crucial that all trustees are supported so that they can fully understand the impacts and risks of the decisions they are being asked to make.

“Often a fear of looking stupid and a lack of understanding is a big barrier”¹⁷

Solutions

For charities

- It is important to minimise assumptions of knowledge amongst trustees. Keep in mind that it isn't only young trustees that don't understand every subject area in detail, and present information to all trustees in a way that helps them understand issues without requiring expert knowledge. Even just using simple language can make complex issues much more accessible.
- You may have to review the working practices of your board. Are your papers clear and do they include the relevant information? Are trustees flooded with too much detail?
- You should aim to set an example by welcoming questions and creating a culture that values trustees and encourages their input. Indeed, often someone with a slight lack of knowledge often asks the most insightful questions.
- Having a diverse range of opinions and experiences leads to good governance, and boards must set a culture that encourages questioning and scrutiny in a way that does not put younger trustees off.

For young people

- If you don't understand something, ask! If you feel like you don't understand the papers it is important to speak to another board member and ask someone to help you work through them.
- If you find the papers or information being presented don't make sense, ask for explanatory notes to be included and/or ask for the information to be presented in a different way.
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¹⁷ Respondent to the Young Trustee Survey in 2014

6 Thanks

Charities Aid Foundation (CAF) would like to give our thanks to a number of organisations for their support over the course of this project. We would like to begin by thanking Leon Ward, who has provided guidance, support and advice throughout, and whose excellence as a young trustee and enthusiasm for encouraging others to join him has helped drive this issue forward.

We would also like to extend our gratitude to the former Home and Education Secretary David Blunkett, Andrew Percy MP and Baroness Tyler of Enfield for their chairing of the Growing Giving Parliamentary Inquiry. Their commitment to the project has helped to raise awareness of the issue of young trustees, and we hope that their involvement and excellent insight encourages others to follow their lead and engage with civic and public life. Our gratitude extends to those organisations and individuals that contributed to the Inquiry throughout, and to many for their ongoing support and collaboration with us.

Finally, we would like to thank respondents to the Young Trustee Survey, whose comments and experiences helped us to better understand issues facing young trustees, as well as the benefits to both young people and charities that ensure that boards include representation from people of different ages. We hope that those charities, businesses and individuals that share our aim of creating more trustee positions for young people can join us in creating a climate that leads to the development of more young trustees.

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7 Further examples and case studies



Plan UK – a global children’s charity.

Plan UK currently has one young trustee – who acts in the full capacity as a trustee, goes through the same recruitment process as other trustees and participates in all activities both internally and externally. They are registered with the Charity Commission and are an independent voice on the board that just happens to be young!

Plan also has two young observers who are recruited from Plan UK’s internal Youth Advisory Panel. They are able to participate fully at meetings, receive all board papers but, if the board ever held a vote they wouldn’t be able to cast one as they are not registered trustees. The theory is that we will be continuously developing a pool of future trustees who understand the organisation. They also have a board buddy; or at least the option to have one if they want one.



Step Up To Serve – the charity behind the #iwill campaign which has a vision to make social action the norm among 10-20 year-olds, whatever their background.

Step Up To Serve (SUTS) have two young trustees who specifically represent young people’s perspectives on their board.

The trustees go through a full application process, with an internal short listing and then an interview with the Chair and CEO.

SUTS recognise that some young people will lose out financially for participating as trustees, due to having to take time off work to attend the meetings. To alleviate this issue they have created a bursary scheme so that young trustees can reclaim expenses for lost wages; which is important as young trustees often work in roles where there is no or very little flexibility over shift patterns. This can also help when they have to use their annual leave to participate throughout the year.



Brook – the young person’s sexual health charity.

Brook reserve two spaces specifically for young trustees who are recruited on the basis of the skill needed.

Brook also has spaces for elected trustees and anyone over the age of 18 can serve which means there can be more than two young trustees on the board. The youngest current trustee elected is 23 years old.



British Youth Council – the UK’s national youth membership organisation.

The BYC board is wholly made up of 16-25 (the Charity Commission can grant an allowance to allow 16 year olds to register as Trustees) year olds who seek election.



Girlguiding – the leading charity for girls and young women in the UK.

Girlguiding want to empower girls to choose what they do, have their say and shape events and activities at every level.

Part of the Girlguiding Trustee Skills Audit ensures that they have a representation of different ages and backgrounds on their Board. As a result, currently 20% of their Trustees are under the age of 30.



Westminster Kingsway College – large general further education college in Central London.

The Governing Body at Westminster Kingsway is made up of Governors (another word for trustees) from a range of backgrounds and experiences. Most are external Governors recruited through targeted recruitment methods dependant on an analysis of the skills needed.

The Board has four committees and as an external governor, the young person on the board can choose which committee to sit on. Currently, the external governor under the age of 30 and their Board's two student Governors (who are often under the age of 30) are members of the Quality and Standards Committee.

Students' Unions in universities

The majority of trustee boards (made up of Full Time Elected Officers, Student Trustees and appointed external trustees) in University Student's Unions/Associations in the UK will fit into the 'young' category of Trustee.

When you look at the 'external or non student trustees' the majority are made up of older trustees with specific skills for finance, legal issues etc.

They often have a mixture of elected and appointed trustees. Usually, those that seek election for office within the Union itself also become trustees by default, while student trustees are elected by the student body and then the board appoints external trustees.

