

# MISSED EXPERTISE:

2027

MAPPING EXPERIENCES OF  
FIRST-TIME FOUNDATION  
TRUSTEES



AUTHORED BY ELI  
MANDERSON EVANS  
WITH SUPPORT  
FROM  
THE 2027 COALITION

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# FOREWORD

When I was 29, I was asked to join the board of a high-profile grant-giving organisation. I was flattered, recognised the career-enhancing opportunity and immediately said yes. There was no induction, so soon afterwards I found myself outside 'the Boardroom', waiting to go in. Upon entering, I was sitting around a huge table, clutching the 186-page report that I'd skim-read around full-time working in the five days I'd been allocated to read the papers. Everyone in the room was middle class, white and significantly older than me.

I'll never forget that first meeting and my levels of discomfort throughout; the dawning realisation that the Chair would allow me floorspace when we were discussing ethnic minority communities or young people but my contributions elsewhere in the agenda were politely disregarded. The whole experience was wholly disempowering and dispiriting.

I now realise that this has been the experience of many first-time Trustees, especially those from minority backgrounds in the grant-giving sector. So many boards acknowledge that they must diversify and attempt to do things differently, but this is often without a clear focus on what needs to change, why, and how. I write this as a partner of 2027. This powerful programme takes brilliant frontline workers from working-class communities and prepares them for decision-making roles in grant-making organisations. The aim is to work with and within the sector to create a more equitable playing field and to source the missed expertise of those outside of traditional talent pipelines.

This report lands at exactly the right time. The sector has spent too long navel-gazing around issues of inclusion, agonising over the need to attract diverse candidates to counter its 'hideously white' image. The real challenge has been completing the nuanced authentic work needed to make this transition into a positive experience for the new trustees. Racing to change the power dynamics of who sits around the table is meaningless if just quickly changing the faces is the only action. The real work means thoughtful commitment, and this must be the golden thread that runs from the Chair throughout the whole organisation.

I welcome the fact that this report has listened deeply to those who have felt othered and overlooked in these formal spaces. We learn by hearing from others, how we inadvertently create challenges and barriers and, therefore, how we better recruit and retain so much currently missing expertise at board level – those with a deep understanding of, and connection to, the communities such organisations exist to serve. My hope for this report is that it encourages real action and also provides some best practice advice that can be easily utilised. My sense is that the sector is ready and now armed with this report; there can be no more delay on ensuring inclusive governance looks, sounds and feels different moving forward.

**Ruth Ibegbuna** is a social entrepreneur and the founder of RECLAIM, The Roots Programme and Rekindle School. She is a partner of the 2027 Programme.



# EXECUTIVE SUMMARY

## EXECUTIVE SUMMARY

It is clear that the funding sector in the UK is increasingly interested in accessing the expertise, experience and diversity of input from beyond the grant-giving sector's 'usual suspects'. We see great potential for positive impact from the trusts, foundations and grant-giving organisations that make up the funding sector in the UK if they turn such interest into an active commitment to create boards that more closely mirror the communities they exist to serve. By establishing more reflective, transparent and equitable boards we believe funders will inspire change beyond the sector, due to their unique position in society to influence the behaviour of charities and civil society organisations.

Our research shows that there is emerging good practice at board level with a rich mixture of quick wins and more long-term strategic changes that Trusts and foundations – and charities, more broadly – can make in diversifying those that serve as chairs and trustees on their boards. In doing so, they can attract, retain and get the most from a wide range of people who would never previously have found themselves at board tables. These people bring with them a wide variety of skills, knowledge and expertise that is often missed on boards. Much of this missed expertise stems from lived experiences of, and proximity to, the issues that a grant-giving organisation focuses on, and subsequently positions such individuals as having deep understandings into the realities of communities. Such ability to understand and relate is often missing at board level, where working cultures and hiring practices prioritise those individuals from senior, highly professionalised, backgrounds. Because these 'usual suspects' are often positioned furthest away from the issues that they have considerable influence over in terms of grant-giving activities and alongside colleagues who hail from similar backgrounds, boards can often function as an echo chamber of an unrepresentative prevailing culture.

This report focuses equally on the support that first-time trustees often require, alongside changes that trusts, foundations and charities may need to make in order to develop culturally more inclusive board environments. This report also seeks to shed light on the important role of chairs on boards, viewing them as fundamental to creating more inclusive board environments or in sustaining a culture which does not benefit first-time trustees from diverse backgrounds. As such, we spend some time looking into the opportunity to support chairs to foster inclusive board environments that cater to beyond the comfort of the 'usual suspects' in order to attract and retain missed expertise. In addition, we include a specific section to look more closely at the realities of racial diversity at board level with some amazing insights from two experts working on racial injustice issues at board level. It is clear that, with such a lack of racial diversity at board level and high levels of tokenism around board appointments of colour, there needs to be concerted personal and organisational reflection and learning around structural racial injustice before change can be authentic and nuanced.

Whilst this report is focused towards first-time trustees, we believe many of the recommendations and the learning that we explore is also relevant to existing trustees and teams working with boards more widely.

## The key recommendations from this report are:

1. **No new trustee should start without a comprehensive and structured induction.** This should include three key things:
  - They should receive training to give them a solid understanding of board governance and their role and responsibilities;
  - Early and pre-planned opportunities for them to give feedback to the Chair on their experiences; and
  - Social and buddying opportunities with both staff and fellow trustees.
2. **Any board looking for 'more diverse' trustees should engage an external professional experienced in working with organisations to reflect on their practice and culture** to assess and develop more inclusive practice. This should include the opportunity to observe a board meeting and provide feedback on current practice and areas for development.
3. **Serious efforts should be made to transform the physical environment where board meetings take place** to create an atmosphere where all feel comfortable and able to contribute. This could include removing large, domineering board tables or having some meetings in less formal rooms to help get the most out of a broader range of people.
4. **Boards need to adopt a more flexible approach to meetings to enable first-time trustees to contribute from a more equal footing** where privilege or a lack of privilege does not undercut their ability to contribute. This may include sending papers in sufficient time for them to be read and absorbed fully, shorter meetings, meetings with sufficient comfort breaks and meetings that suit people with caring responsibilities.
5. **Recruitment processes for new trustees should be transparent and openly advertised** with a focus on encouraging trustees to join in pairs or small groups with 'cohort inductions' to avoid feelings of isolation. Recruitment processes should be two-way conversations that support potential trustees to understand the work of the organisation and the role of trustee as fully as possible.
6. **We urge people not to compare or contrast different protected characteristics when seeking to recruit diverse talent**, but rather reflect on their audience. While recruiting for new board members, boards should look to the communities they serve as an organisation and seek to represent those communities in the demographics sitting on the board.
7. **All trustee expenses should be covered upfront, including travel costs and refreshments.** There should be a clear expenses process that is made readily available to all trustees and demonstrates a culture where board members are not expected to be out of pocket as a result of serving as a trustee.
8. **Regular trustee visits to grant beneficiaries should be encouraged** to shrink the gap between the board and those that they fund. This will enable all trustees to better understand the needs of their beneficiaries and the impact of their grants, rather than looking to the sole trustee who has lived experience to provide this.

9. **First-time trustees should be able to access an external support programme** that will support people to develop the knowledge, skills and confidence that is required to thrive at board level. Such a programme should include one-to-one coaching in addition to peer learning and be considered as professional development.
10. **Chairs should receive formal and robust inductions before they start their role.** They should also be able to access ongoing training and support with a focus on creating inclusive and accessible board environments while undertaking structured appraisals and opportunities for board members to share feedback and request additional support.
11. **Chairs should spend time building individual relationships of strength with board members** to foster trust which will, in turn, encourage bidirectional feedback. Chairs should also create structures and regular appraisal opportunities to create space for this feedback more formally.
12. **Serial trustees, where possible, should step aside (or down) in order to create space for more diverse and representative trustees.** If this is not possible, boards should grow to accommodate missed expertise at governance level, whilst ensuring that the board size remains manageable and facilitating good succession planning.

In the wake of this report, and some pre-pilot testing of different support models, the 2027 Coalition is excited to announce the launch of the 2027 Trustee Coaching Programme. This programme is aimed at supporting first-time trustees in trusts, foundations and charities to thrive in their roles. The two-year bespoke support package which combines one-to-one coaching, peer learning, powerful resources and 360 reviews alongside a board's chair supports the development and confidence of first-time trustees. We see the programme as bridging key gaps evidenced in this report, such as meeting people where they are at through focusing on person-centred support where we encourage bringing your whole self to board meetings. The programme also creates space for trustees to connect with other first-time trustees that may share similar experiences to combat feelings of othering and isolation. In addition, we focus on growing robust understandings of board responsibilities and duties to push back against notions of feeling like you cannot speak on issues that do not pertain to your experience.

## CONTEXT

The issue of diversity at board level is a big one, but by no means a new one. The current culture is that most trustees of most foundations are "99% white, 60% over 65 and 68% male".<sup>1</sup> This diversity deficit and subsequent culture manifests in a number of ways that effectively excludes many first-time trustees who do not hail from the more traditional trustee 'pipelines'.

It has long been argued that the sector needs to actively accommodate the voices of frontline workers and the communities they wish to serve at board level. The recent push from foundations to 'recruit diversity' into boards is welcomed, but brings questions as to motivation, understanding and readiness

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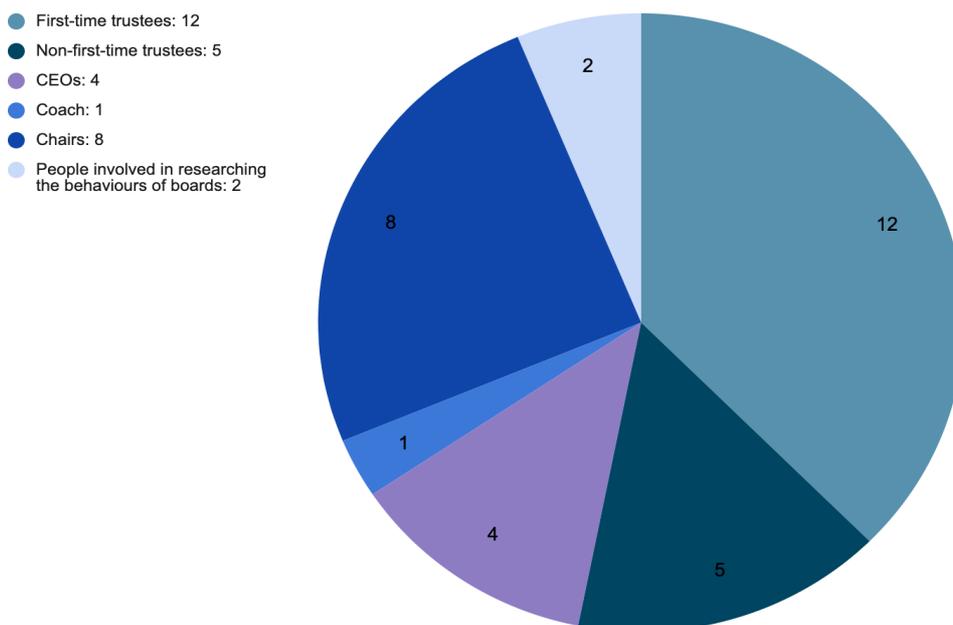
<sup>1</sup> Professor Stephen Lee et al., *The Awareness and Effectiveness of Charity Trustees in Grant-making in England and Wales*, Research and analysis of grant-making foundation trustees' perceptions of their role and responsibilities as trustees, Association of Charitable Foundations, 2018, p. 4.

of a board to actively accommodate demographics and experiences that have previously been excluded from governance settings.

This research has found that many trust and foundation boards are home to a culture which does not always serve as an inclusive space for first-time trustees. This is one reason why there is such a high 'bounce rate' associated with first-time trustees who resign from boards.

## METHODOLOGY & APPROACH

To paint as comprehensive a picture as possible of the experiences of first-time trustees in foundations, we reached out to a cross-section of 32 people with a range of experiences, perspectives and ages, ranging from the those in their early 20s to those in their late 70s (given the relatively low numbers of first-time trustees and the small trustee population of funding organisations this is a robust sample size). This included first-time trustees of grant-giving organisations and chairs as well as CEOs, charity trustees and those that support the work of boards more generally. This can be seen in the diagram below:-

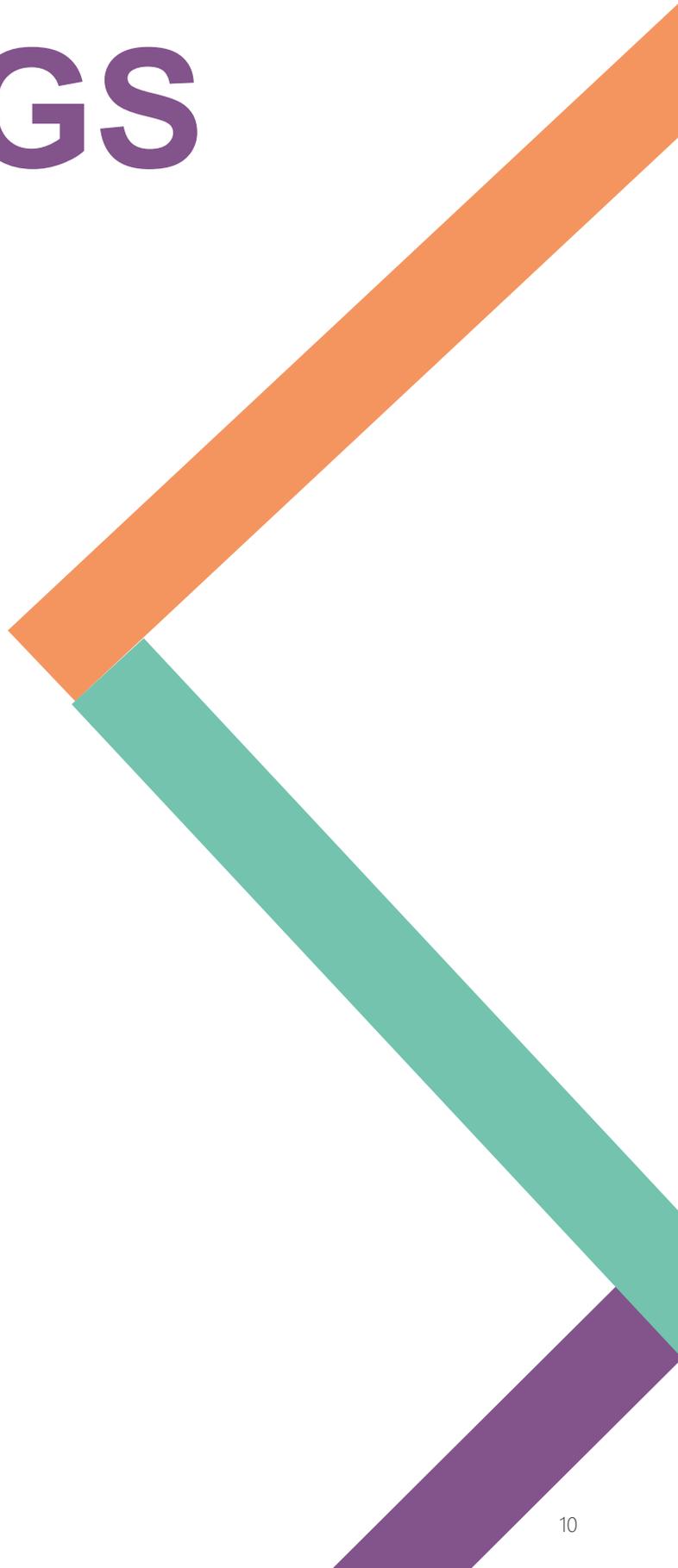


Interviewees were asked a series of questions ranging from how they came to be a trustee and what support they received, to questions about barriers to contributing in board meetings that they have encountered. Chairs were asked a similar set of questions with a focus on the opportunities and barriers to build inclusivity into boards. We also asked chairs specifically about what they thought makes a good chair and how they tailored support to trustees. Answers were anonymised and all participants were informed that no organisations would be mentioned in this report. This enabled people to provide answers that were as honest and authentic as possible. We were overwhelmed by the depth of

information shared and people's thoughts on how practice could be more inclusive to improve the experiences of first-time trustees.

It is important that we acknowledge the need for deep anti-racism work to accompany any efforts to racially diversify a board. This report seeks to work alongside anti-racism work which we view as deeply fundamental to building a more reflective, equitable and transparent funding sector. We believe the issue of boards and racial injustice and racism is one that needs to be addressed in much more depth and acknowledge that this report does not explore these important issues in the depth needed. However, despite the constraints of this research we felt it imperative to create space for experts working on race and governance to share their work and insights directly. We urge readers to follow up on the work of Malcom John and Precious Sithole for a fuller understanding of this issue and some of the support available.

# THE FINDINGS

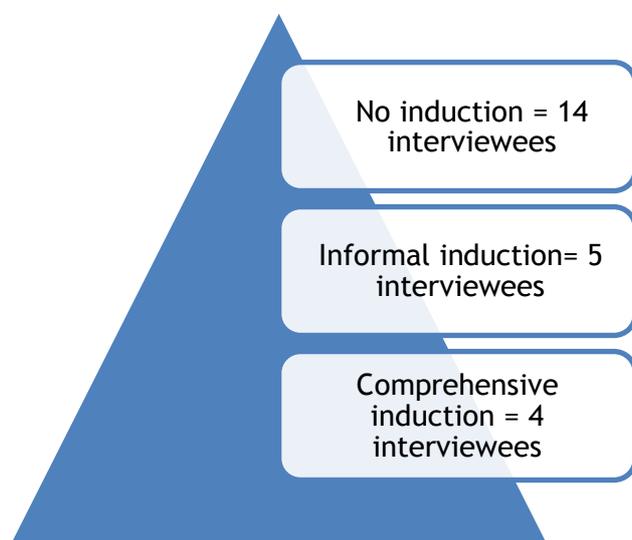


# THE FINDINGS

## THE IMPORTANCE OF AN INDUCTION

*“Read as much material as possible before the meeting. Read stuff because you will naturally go into the meeting with more confidence”.*

We heard that feeling too uncomfortable to contribute at board level is bound up in a number of things. This ranged from imposter syndrome, a culture that does not speak to their experience or simply not having the tools to navigate such a space. It was clear that boards could do significantly more to prepare first-time trustees for success and a comprehensive induction programme is key to this.



14 out of the 23 trustees we interviewed received no induction before attending their first board meeting. Five interviewees received an informal induction constituting a simple phone call with the chair or CEO and/or a brief run through of Charity Commission documents on the role of trustees. It was clear that interviewees felt strongly that this was the most significant downfall that could have easily been remedied. The four participants who received comprehensive inductions felt this level of support was hugely important in shaping a sense of belonging and confidence in their work as a trustee. The best inductions were linked with further professional development and training opportunities that explored the core skills needed to thrive at board level for those who were inexperienced in this.

A number of participants expressed the need for training early on to establish a basic understanding of charity accounts and a basic understanding of investments, particularly in the case of those sitting on the boards of trusts and foundations. Participants saw the acquisition of this knowledge as a way to combat feelings of being a token hire, through having some hard skills that would allow contributions on ‘core’ board matters.

One participant told us that:-

*“Training in how to exert your influence, maybe something similar to public speaking training, would be really useful in learning how to get your point heard on a board, it is a real skill. It’s why certain trustees always get to make their point and set the agenda and why others get their points pushed to AOB (any other business)”.*

It is extremely important that inductions include a focus on how new trustees can raise issues or talk to their chair if they are in need of some support or worried about something in a meeting, for example. It is fundamental that a chair lays out and creates space for first-time trustees to understand how best they can communicate inside and outside the boardroom. Through such conversations, trustees should be equipped with an understanding of how they should raise issues with a chair if something comes up in a meeting, whether that be raising it there or after. They should also talk through scenarios where a trustee does not feel comfortable to contribute to the meeting but has a point they would like to make, and perhaps the ways in which a trustee could share that point before the meeting. We recommend that the chair and new trustee(s) should work together developing a worksheet of questions in order to understand and build soft power at board level.

An example of the sort of learning that should be essential to any induction programme for first-time trustees is a glossary on the language used in a board, inclusive of organisation-specific terms and acronyms, as this was one of a number of exclusionary elements identified through the interviews. Participants, time and time again, spoke of the ease at which this hurdle could be dispelled. One first-time trustee shared the following recommendation:

*“Providing a simple crash-course or glossary of useful words that would allow people to be confident and able to follow board meetings”.*

Alongside calls for more formal and structured inductions, interviewees stressed the need for informal opportunities outside of the boardroom to connect and build relationships with their fellow trustees, CEO and chair. A positive example of this was two trustees’ experience of an away-day followed by an overnight stay with their fellow board members. This allowed people to build organic relationships and establish where common interests lay. This space also helped people to connect outside of the boardroom that countered feelings of isolation and challenged feelings of imposter syndrome.

*“It’s ok to feel nervous about the room, you don’t need to know everything, and you have been brought on the board for your perspective”.*

## **CULTURE, PEER-TO-PEER SUPPORT AND THE IMPORTANCE OF CHAIRS**

*“It’s important as a trustee to know what you really want to change. You should be able pinpoint your impact”.*

Most participants, when asked what a supportive board looks like, spoke about the need for a culture of transparency, honesty and mutual respect. Participants stated the importance of providing regular feedback and accountability opportunities in order to feel supported and listened to. Some of the most positive

accounts from first-time trustees were associated with high levels of regular check-ins and reviews, especially those where trustees had structured 1:1 opportunities to talk with the chair regularly.

*“A board, by definition, is very expertise focused; this also sets the board up to be very individualised in terms of people’s personalities. To go into that forum if you are not confident, from that background, or privilege can be extremely challenging, therefore, you need to have an ally to make it less of an individualised experience.”*

Several participants indicated the unsupportive nature of the siloed approach of many boards, stating that “the way it is set up is challenging to ideas of collective decision making through its makeup of individual experts rather than a team”.

In some cases, this focus on individual expertise can have a negative impact on the ability of first-time trustees whose skills and experience may lend them to being described as ‘experts by experience’, rather than those coming from a professional background. It is important to mention here that an over reliance on valuing professional backgrounds denies the reality that all trustees bring a valuable range of skills, knowledge and other qualities, including but not limited to those gained within a work context.

Some participants spoke of feeling barred from contributing on matters that a trustee was said to be the expert on, leading to feelings of self-doubt and confusion as to where their value resided. As such, many interviewees suggested that efforts should be made to develop a collective approach to board tasks through away-days and informally structured board meetings. Here, trustees are able to get to know each other and ideally see value in each individual’s unique experiences. This helps build a level playing field from which to contribute from.

Peer-to-peer support opportunities were ranked highly by interviewees as an extremely effective way of combating feelings of isolation and non-belonging on the board. People described several buddy variants being used in the most positive trustee experiences. Buddying allowed trustees to ask questions that they may not have felt comfortable asking during board meetings. Many stated that the supportive elements of a buddy would be more impactful if they also had a coach who would be able to give support in a more formal and structured manner.

*“Chairing is really important in terms of how people are heard or not.”*

All trustees we spoke to echoed the importance of a skilled chair on the board to adequately address feelings of isolation through non-contribution and effectively navigating different personality types to enable contributions from all. The majority of the participants who self-defined as extroverts, and confident contributors in meetings, felt they were able to get their voice heard but appreciated this would not naturally be the case for those with a more introverted personality. One introverted participant discussed how the chair adapted to their contribution style by checking in with them at breaks and asking if they would like to submit a written point to the board rather than speaking.

## ACCOMMODATING INCLUSION

*“The boards of foundations can be good places to exert influence but this all depends on whether they are an organisation open to challenge, are they reflective? If you feel after the first few meetings they are not open to being challenged or to other viewpoints, then leave.”*

### TIME AND FINANCIAL MATTERS

When asked about a change that they would like to see enacted at board level to promote inclusive practice, participants overwhelmingly spoke about time. The time that meetings take place, for example, has a profound impact on the ability of trustees to contribute. Interviewees spoke of a number of real issues with getting childcare cover for the often long, full-day meetings. Those with other caring responsibilities also spoke about the struggles in managing their competing responsibilities. They often cited that the inflexibility of board meetings left them in very tough predicaments, especially for those who lived further away and had significant travel time to incorporate. The impact of the COVID-19 pandemic has proved that boards can effectively operate remotely, and, as such, we urge boards to reflect on the need to make in-person meetings a compulsory component of being a trustee. The ability for boards to embrace remote working will, no doubt, also open up positions on boards to those that live outside of London and for whom such travel serves as a significant barrier. It is important to note here that whilst remote board meetings may allow organisations to engage with new voices at board level, they also remove the opportunity for trustees to have informal face-to-face interactions which interviewees stated was really important for building relationships and confidence. As such, it is not necessary to ensure that all meetings are in-person but it is about recognising that a mix of online meetings and some in-person meetings can be beneficial and that there needs to be commitments to provide trustees with ‘social moments’ in addition to core board meetings.

The length of time associated with reading board papers also served as a barrier to accommodating inclusion for most of our participants. Time and time again, interviewees complained that board papers were not circulated in advance to allow them to plan and actively read the papers alongside their other commitments. Sending board papers in advance is a truly simple way of promoting inclusion without even altering the systems of the board. In addition, many board members we spoke to mentioned that the content of board papers can often serve as a barrier. We recommend that boards develop the content of their papers using language that is accessible to all and seeking to reduce the volume of text included as much as possible.

Participants cited the financial impact of using annual leave to attend board meetings and issues around expenses as barriers to inclusion. Many expressed how their inability to claim expenses upfront made them feel embarrassed, othered and essentially feel like they couldn’t challenge the policy. One participant spoke of how they were unable to eat during a full-day board meeting because they didn’t have the money to buy a sandwich upfront to later claim back. Another spoke of their inability to concentrate during board meetings as they were worried about their finances after a delay in being reimbursed.

Fundamentally, inadequate expense mechanisms had real implications on the cash-flow of many first-time trustees and their ability to attend meetings. As a result, participants recommended that upfront expenses be provided to cover travel costs, food and anything else required. The financial consequences experienced by many on boards were seen as undermining their ability to contribute on an equal footing alongside their peers, further reinforcing their feelings of imposter syndrome and isolation.

Boards are typically very lazy about exploring trustee compensation. We understand that you need special dispensation from the Charity Commission to pay trustees, but that does not mean it is impossible, especially if those trustees are playing a critical role on particular aspects of the work. You can also support trustees with financing their professional development or buying them equipment to help them act as a trustee. Such equipment support can also be useful for new trustees in their broader lives (e.g., laptops or contribution to home internet costs). Most foundations are too distant and lack the understanding of people's lives to explore these things and this needs to change. We recommend asking how you can support a new trustee in ways that meet them where they are. Have a conversation and create space for this to be a regular opportunity for a chair or executive team to explore the ways in which they can financially support trustees to thrive at board level. We advise looking at the Charity Commission's guidance in [CC11 Trustee Expenses and Payments](#) which specifically covers what constitutes a trustee expense, for example reasonable childcare costs or care of another dependent; a proportion of a trustee's broadband subscription (based on their usage for the charity).

## PHYSICAL ENVIRONMENT

Participants felt that the very structures that permeate the board room often prevent inclusiveness and act as a barrier to participation. People spoke of the boards' physical environment – often an oversized domineering table in a regal building in an expensive London postcode that people would not normally find themselves in. These physical attributes alone reinforce a power structure that can be very intimidating to those who do not have experiences of being in these kinds of places, and exacerbated people's feelings of being different and not a traditional trustee.

Through the interview process we identified two trustees, hailing from the same trust, who spoke about their positive experiences of a trusteeship following changes to the physical layout of board meetings. Their specific trust identified that the existing layout was a formal style where trustees were positioned around a large table. With trustees seated quite far from one another and the chair sitting at the head of the table they felt like this setup did not promote collective decision making. They also acknowledged that the existing layout reduced the level of contribution from many first-time younger trustees, in comparison to their level of input in smaller, more informal, groups. As a result, the CEO and chair took to a different approach and held board meetings in a completely different building altogether. The new environment contained seating arrangements such as sofas and large beanbags, which better reflected the comforts of younger trustees. By doing this, first-time trustees immediately felt more at home and trustees from a more 'traditional pipeline' enjoyed the new environment. The change in the physical space of board meetings increased dialogue between trustees and had an overwhelmingly positive effect on people's sense of comfort and how they contributed to the board. In this respect, board meetings more closely emulated the trust's informal away days that first-time trustees felt were valuable in building genuine relationships between trustees. It also helped to dispel a sense of imposter syndrome amongst first-time trustees.

On page 5 of this paper, we offered a recommendation on the physical layout of a board meeting, suggesting that there are small alterations that would make a big impact in terms of enabling inclusive practice. We also note that the flexible and more relaxed approach to the physicality of meeting spaces should be reflected on in order to accommodate people that may have restricted access. This should be seen as a live conversation that flexes to the needs of those who sit on the board.

## RECRUITMENT AND ROLE FLEXIBILITY

*“If after the first two meetings you don’t feel like you are a good fit and can comfortably contribute then you should leave”.*

Recruitment ranked highly in terms of areas where trusts and foundations could introduce a much more inclusive practice at an early stage. Participants spoke of their experiences being recruited through word of mouth and felt this was representative of a highly privileged space. Trustees expressed that this type of recruitment practice reinforced the exclusive nature of the role, reinforcing their lack of agency through having to wait on the ‘gatekeepers’ to see their value. This presented a power dynamic that, for many, seemed very undemocratic. Most stated that the recruitment process should be as transparent as possible, beginning by openly advertising positions. Younger trustees advised that foundations should also work on collectively changing the profile and experience needed to be a trustee. They suggested that more young people would be encouraged to join boards if the positions were advertised in an accessible way. In addition, they spoke about the need for trustee advertisements that discussed the skills needed for a role in a much more holistic manner, speaking to passions and experiences rather than ‘hard skills’.

It was also suggested that boards should strive to develop flexible roles. For example, opportunities to co-share the responsibility of a trustee position. One participant added in relation to their suggestion around job sharing that “it’s collective decision making anyway so this would add to the output of the board”.

Several people we interviewed, including the CEO of a charity and a foundation, suggested the need to recruit people from diverse backgrounds in pairs to reduce feelings of isolation on the board.

*“To go into that forum if you are not confident or from that background of privilege is really hard, you need an ally to make it less of an individualised experience”.*

It is worth mentioning that while many foundations are simply aspiring to no longer have 100% older, white and middle-class boards they are not seeking to make the people they serve a majority on their boards. Funding organisations are not looking at the communities they serve and the experts who are from or work with or deeply understand those communities and ensuring they take the majority of board seats or even a significant minority on the board. This needs to change, and we urge organisations to not just accommodate one or two people that look different to the majority of board members but to act boldly to make good on their commitments to mirror the communities they exist to serve.

## RECRUITMENT WITH GETTING ON BOARD

Too often, charity trustee recruitment practices are like picking a team for a lunchtime football match: just tapping our mates on the shoulder. Like the playground, this can leave others feeling excluded and inadequate, just because they don't have the 'right' connections.

Such practices result in organisations missing out on the invaluable insights of a vast range of people – from the rich mixture of work-based skills, protected characteristics, personal qualities and lived experience that exists within our beautifully diverse society; people who bring the creativity, imagination, courage and effectiveness needed by boards.

Openly recruiting for trustees is the most significant way we can remove barriers to trusteeship – and being intentional about how we welcome people to the boardroom helps retain those brilliant new trustees.

Boards often talk about finding the right 'fit' but be wary of this – it can perpetuate our tendency to recruit in our own image, as we can often relate more easily to those that are like us. Sometimes the 'best match' for your board is a new trustee who will bring positive and considered disruption to how you think and do things. A shared commitment to your cause and values is, therefore, more important.

Five of our top tips:

1. Work out what you need on your board to address the challenges and opportunities you're facing in the next 3-5 years, including lived experience and voices from the communities you serve. Where there are gaps among your existing trustees explain why you are looking for those attributes so that people can self-identify that they have what you need.
2. Don't ask for seniority in a professional context or qualifications unless there is a genuine justification for this. New trustees can learn what they need to know.
3. In your advert, describe the trustee role as it looks in your organisation – in straightforward and practical language.
4. Target where you advertise to reach the type of people you're looking for. Choose a mix of methods and consider who you can contact proactively to help get the word out.
5. Give your new trustees the best chance to succeed with a comprehensive induction that takes account of what they've said they need.

### Getting on Board

Getting on Board is the national charity dedicated solely to ensuring that charity board leadership is sustainable, responsible, diverse, and reflective of wider society. We support people to volunteer as charity trustees, particularly those who are currently under-represented on trustee boards. We also support charities to recruit and retain diverse trustees, and help employers connect their employees with amazing volunteer opportunities.

## PROTECTING PROTECTED CHARACTERISTICS

*“Don’t let people box you into your experience”.*

The approach to diversity at board level should be flexible and open to regular review, reflection and dialogue between trustees and the chair. As is offered below, this is an approach that should be adopted across the board to support a variety of people that may have difficulties navigating the board room. The specific demographics in focus do not represent a comprehensive list but, rather, the main areas that came out of the research.

### DISABILITY SUPPORT

*“(Don’t be afraid to) ask for ‘workplace’ adjustments”.*

One first-time trustee stated, when asked about the levels of support they have received as a first-time trustee, that:

*“It is often difficult to get the balance of support needed for disability, without weird power dynamics developing”.*

They felt that inclusivity around disability should be looked at through ongoing conversations between the individual and the chair. These conversations should discuss how they feel they can be best supported in order to contribute comfortably on the board, reflecting the changing nature of fluctuating health. They spoke about small things that boards could implement “to get the balance of support needed”, such as providing accessible board packs as standard practice. The same first-time trustee also suggested that boards should create budgets for disabled trustees which would help to cover things such as accessible software to support them to read papers, as this would indeed be a reasonable adjustment for somebody who is disabled.

Several people spoke about the physical layout of the boardroom and the poor accessibility of buildings they were held in. One first-time trustee spoke about the difficulty of feeling comfortable in a room which was not accommodating to their condition. Despite most organisations being very aware of the need for buildings to be accessible, it was apparent from the interviews that governance is often seen as very separate to the accessibility scope of an organisation. As such, boards need to ensure that they are physically accessible to all trustees, not just those who do not have a disability.

Intentions to increase diversity can sometimes lead to boards identifying a person with a disability for example, or other protected characteristic or experiences, as the mouthpiece of their whole community/demographic. Following a conversation covering issues of tokenism and the unfairness of being asked to speak for an entire community, an interviewee stated:

*“If you are a younger disabled person, it is ok to feel nervous about the room, you don’t need to know everything and you have been brought onto the board for your perspective”.*

It is extremely important that new trustees are supported to build expertise in areas that do not solely relate to their experience. As the above interviewee stated, it is all about your perspective and, as such, that perspective is not solely tied to discussing your experiences or the community which you exist within but, instead, is about using your unique perspective to view other issues and inform how you may approach

certain topics at board level. In order to support trustees with experiences of disability to fully recognise the power and value of their perspective, boards need to consider early on before they recruit why they are seeking to bring disabled people onto the board. Is it for tokenistic reasons, or is it to help bring perspectives and expertise that are missing on the board?

## TOKENISM

The issue of tokenism more broadly is important and was raised by many. Efforts to increase diversity can often be performative, in order to give the appearance of disability or racial equity within an organisation. Such tokenistic actions to have a black person or disabled person on a board as a marketing opportunity or to ward off calls of a lack of inclusivity in an organisation is deeply wrong for a number of reasons but perhaps most importantly can be deeply damaging for the trustee in focus. Whilst a trustee is able to offer insight and wisdom, unless they are rooted in a larger group of people with the same characteristics that they actively seek their views on, this approach is unrealistic, unfair and tokenistic. In addition, if a board is actively seeking to hire in a diverse manner to appear to be inclusive then this dynamic is often felt by a trustee. As such, if a trustee in such an environment shares experiences and insight which they know will not be listened to or, better yet, acted upon, then the very experience can seriously hurt their confidence and wellbeing. Organisations must do better, and trustees should only be hired if a board genuinely respects and wants to listen to what they have to say.

## INSIGHTS FROM AN INSIDER

*“Read the charity commission guidance! Refer back to it whenever possible, as this is your wider job description and thing you need to do”.*

The insights gained from people that were interviewed who work closely with first-time trustees are extremely illuminating as to the dynamics that present themselves at board level. From talking to a coach of first-time trustees with a wealth of experience working with boards to challenge their behaviours, we identified the emotional support needed for some trustees. Engaging in their work to support first-time trustees with lived experience, the coach stated the following in regards to their one-to-one coaching;

*“The trustees brought with them a lot of issues from their full-time jobs and in order to deal with their work as a trustee we had to first discuss what was going on outside of the room so they could be fully present”.*

The conversation with the coach was echoed by a number of others, including a CEO and someone involved with researching the behaviours of boards. They also spoke of the need to be aware that for some people, from lived experience backgrounds, speaking about personal experiences may lead to revisiting traumatic experiences. As such, when speaking on an issue that may directly impact a particular trustee, the chair needs to ensure their comfort in that space, which may best be achieved through regular check-in and -outs.

Another interesting insider perspective from a CEO shone light on the issues around time on boards.

*“There was no sense of urgency in getting through [board] papers and not wasting people’s time. There was a culture that saw the meeting as a kind of social event which was set up for people who didn’t have any other commitments”.*

This reiterates the earlier point around needing to respect all people’s time better by viewing board meetings in light of all trustees’ personal circumstances and competing responsibilities.

It also highlighted just how distant trustees are from the communities they exist to serve. The CEO in focus suggested that boards needed to better understand the operations and ultimate goals of the foundation. They suggested that trustees should spend less time in the boardroom and more time speaking to foundation staff and visiting the grant beneficiaries or communities they serve. They saw that such insight would enable boards to think in a more inclusive manner.

Another insider with insights into board behaviour spoke about the need for prospective trustees to ask the question of what a board can do for them before joining as a trustee. They spoke about this in relation to the power dynamics at board level and the need to assert themselves from the beginning, asking questions in order to view how much an organisation has done to be inclusive in their practice. They stated that:

*“some of the things they [boards] want are less available to people from certain backgrounds and they may just want someone for one thing”.*

As such, it is important to understand the requirement of a board as much as possible during interviews or informal conversations to understand how you could contribute and fit with the current culture.

## THE CHAIR

According to the Association of Chairs, chairs are defined as being trustees who are tasked with "leading the board in delivering the organisation's aims".<sup>2</sup> Chairs are important and make a fundamental difference to how effectively a board functions. As such, we have developed this section to focus on the strategic role they play; the opportunity to create more positive and inclusive environments. We spoke to eight chairs to hear their insights into board culture and inclusivity in order to shed light on the role they play within this space.

*"A key element of a chair's role is how do you get a good dynamic going with a mix of skills – how do you build that team element? Experience is central to that".*

*"In some ways it is a leadership role, drawing all of the skills out of the trustees to keep them together and make sure the relationship between them and the executive team is productive... We challenge them but also are supportive in that process. A trustee can have a valuable impact on the core ethos of the organisation; if they are at conflict it doesn't work."*

*"The chair is someone who is deeply involved in the organisation and much more connected to the mission and the performance of the organisation and then its role is to get the board to push the organisation to be the best version of themselves."*

## UNDERSTANDING THE ROLE

### EXPERIENCE AND CONFIDENCE

It is clear that being a first-time chair is an often-difficult transition for people with no chair experience, especially for those that do not come from highly professional backgrounds. From the chairs we spoke to, those that hailed from a highly professionalised background were more likely to know other chairs in their networks and, as such, had access to people that could support them and spoke of feeling more confident in their role.

One person spoke about her experience of being brought onto the board as chair after a drive to get more women on boards. In the chair recruitment process she experienced a high level of tokenism despite the fact that she was extremely successful in her career thus far, holding high offices in a large institution;

*"the interviewer was very tokenistic and told me 'I have been told I have to interview some women'"*.

Whilst this was a number of years ago it speaks to the real issues of 'tick-box exercises' that still exist today in recruitment practices. Such practices, miss out on the expertise that boards can engage with through well thought out, nuanced and considered efforts to recruit more diverse candidates.

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<sup>2</sup> Association of Chairs, About Us, [www.associationofchairs.org.uk/about-aoc/](http://www.associationofchairs.org.uk/about-aoc/)

Many chairs are extremely experienced trustees before they become a chair. One respondent that was not an experienced trustee felt like they had been quite naive in terms of understanding the role and the responsibilities of being a chair. They specifically spoke of time commitments required being much more than they had initially thought and just how challenging situations and dynamics on the board would be. As is discussed later in the opportunities for action section, one way around this is to create board associate/or observer roles that could also be used for chairs so they can gain a greater insight into the role, whilst not exercising decision-making powers. It is worth noting that observer roles should be seen as short-term opportunities to gain insights into board workings. In addition, a robust and bespoke induction is extremely important in creating the understanding and confidence to succeed as a chair.

Confidence and comfort also surfaced as a huge issue in those boards where a new chair was brought onto the board due to conflict or mismanagement. When this reality was not met with adequate support it left the chair feeling extremely uncomfortable.

*"I felt as if I had been thrown in the deep end and suffered some really challenging moments that were inherited from bad governance beforehand".*

## INDUCTIONS

As we have explored earlier on, an induction is a really helpful way to grow confidence in board members, and this is also true for chairs. Out of the eight chairs that we spoke to, only three received an induction, with one of those stating that it was an extremely poor induction. The other five chairs received no such induction. Five of the eight chairs interviewed spoke of the difficulties around getting to grips with the responsibilities of being a chair, even though all of them had experiences of working closely with the chair of boards prior to their position and had previous experience working on governance and accountability issues.

It is clear that chairs hold a great deal of responsibility on a board, especially in relation to setting a board's strategic vision, facilitating board meetings and ensuring that all board members are heard and valued. Whilst all of the board members we spoke to showed a commitment to ensuring that all trustees are supported to feel as confident and comfortable as possible we can safely assert that this will not be the case for all chairs.

*"There is a great deal of ownership of the chair and the emotional intelligence of the chair to sit down with the new board members and talk through what their role is and what gaps there is on the board in terms of expertise and experience. The emotional intelligence of the chair is paramount to the success of the board. I have annual trustee appraisals. It is very important early on that trustees have a strong induction and that the chair is conducting the orchestra of diverse talents of the board."*

Reflecting on the experiences of first-time trustees that we spoke to in this report it begs the question; If all chairs had a comprehensive induction that included a commitment to understand the ways in which they can support trustees from diverse backgrounds, would first-time trustees have much more positive experiences?

*"I had inductions and there was a chance to speak with the chair and CEO. But this support offer was never ongoing, your growth in understanding really relied on speaking with other trustees on the board or self interest in learning more."*

## CHAIRS AND THE BARRIERS TO AN INCLUSIVE BOARD

### RECRUITMENT

The majority of the chairs we spoke with were recruited through a personal relationship or word-of-mouth within their network. This reality mirrors the dynamic which Getting On Board highlighted in their 2020 report which found that “90% of charities recruit most of their trustees through word-of-mouth and existing networks”.<sup>3</sup> Like we have discussed in relation to first-time trustees, recruitment processes should instead be through open recruitment channels, ensuring that the risk of tokenism is reduced whilst also adhering to organisational practices of equality and diversity. By conducting formalised recruitment processes, either internally or through a recruitment organisation, boards forced to open up opportunities beyond their networks which no doubt speaks to certain demographics over others. In addition, recruitment processes allow an organisation to better understand the realities of recruiting for people with certain experiences or passions, for example lived experience around mental health. As such, the recruitment process can create space to learn about the ways in which you may need to flex in order to create an environment, recruitment process and onboarding process that is inclusive of and supports people with lived experience of mental health issues, for example.

### DIVERSITY VS. SKILLS?

There is often a disconnect in the way that boards view diversity. It is worth referring to the fact that boards often view legal experts as ‘integral’ to the ability of a board to do its job successfully but do not view community experts similarly as integral to a board’s function. In reality, a board uses little legal advice and could easily pay for it without taking a board seat, however, this is not the norm. As such, those with expertise in communities are often not seen as individuals that bring immense skill to the work of a board and this needs to change.

*“The work of the board is more important than overarching inclusivity on the board. I am going to look at the needs of the board first and second I am going to look at inclusivity”.*

Some boards create a false binary between diversity and skills, presenting a situation where either diversity is trumped over the skills needed or vice versa. This is not how we would urge a chair to approach recruiting diversity.

The best way for chairs to recruit understands that there are great candidates out there but that it is important to work with a recruiter or internal recruitment team that understands the communities trusts and foundations are seeking candidates from. It is important that chairs reflect on alternative ways of recruiting people, including reaching out to local community groups directly and seeking out job sites or news boards that are connected to particular communities. It is also important to acknowledge that the candidate you are looking for may not exist in the way that you anticipate – it is essential to recruit for passion and potential rather than a fixed idea of an imaginary catch-all candidate.

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<sup>3</sup> Getting on Board, How to recruit trustees for your charity, A practical guide, 2020, p. 4.

One chair that we spoke with shared their views on being intentional with recruitment around potential in order to engage with groups traditionally underrepresented at board level:

*“Just going out and seeing who floats to the top is not good enough, it is important to be vigilant about who you recruit in terms of recruiters and head-hunters. We do not go to organisations that put up the same faces for everything, but we look for those organisations that challenge. We were told by a recruiter that we need to focus more on potential, rather than looking for someone to step along; we now look for people to step up. We now have a really strong board. I now actively work to fish with a longer line in different pools to find new and different people for my boards”.*

Another way for chairs to drive the diversification of a board is through building mechanisms and structures that allow for people to grow their understanding before assuming the full responsibility of being a trustee. This can be a great way to build confidence whilst also providing coaching, mentoring and support to help a first-time trustee better understand the role before taking it up more fully. However, it is important to avoid tokenism within this and the expectations that they will fulfil the role of a trustee without having any voting rights. This has to be crafted in a careful and reflected manner.

*“You can make boards diverse immediately by creating associate board members, who are or are not full board members ... who have inductions, support, learning and people with them that look like them, and in one fell swoop you will have someone who is different. It is like a kaleidoscope – with one change, it can all change.”*

It is worth making it clear here that diversifying a board is not easy and it may be uncomfortable for chairs to bring about such changes to a board that is not very diverse. However, this lack of comfort is best confronted head on as to reduce the discomfort that a first-time trustee from outside the ‘usual suspects’ on boards would experience.

*“It is difficult work; it is also difficult even if you are a well-meaning liberal. To make it work I think you need sincerity, good will and authenticity from both sides. There needs to be a genuine commitment to make diversity happen on boards from the board.”*

## PROFESSIONAL BACKGROUNDS

*“I’m not really that sure that anyone from the board is not from a professional background. There isn’t really anyone. But it is interesting as most of the recipients of our grants do not come from a professional background.”*

In the rush for diversity there are some less comprehensive understandings of what diversity looks like. As we will explore in the race section, there is a current understanding in the sector that racial diversity is the most pressing issue to address. It is clear that diversifying boards is not about comparing protected characteristics and instead should be focused on ensuring boards reflect the communities their organisations serve. As such, what is often overlooked is a reflection upon whether they are accommodating people from non-professional backgrounds. Whilst most of the chairs we spoke with sought to diversify

their board in terms of race, there were fewer conversations and actions taking place about building a commitment to bring on more expertise from working class or frontline working backgrounds. This is a broad term and may relate to people that work in informal capacities, or may be thought of in terms of people who do not work in offices.

Many people that are embedded in communities doing some of the best work hail from such backgrounds, and, as such, if there is not an active commitment to bringing them onto boards a huge amount of expertise is lost.

*“There are real issues around a lack of class diversity on boards and I have seen people leave boards because of that.”*

Class is rarely discussed in the funding sector and we believe that in order to create more transparent ways of working and more equitable relationships we need to talk about class. As mentioned on the 2027 website, “many trusts and foundations are there to help working-class communities but struggle to do this effectively without the value of the lived experience of these communities within their staff teams or at board level”.<sup>4</sup> This needs to change.

*“We believe that a broader spectrum of class experience at the top of foundations and trusts will lead to better decision-making, happier workforces and more meaningful relationships with the communities that foundations and trusts serve.”<sup>5</sup>*

We are aware that class is a complex term to define and is not static or binary, however, we believe it is useful to remain cognitive of class dynamics in your organisation and board. Class can serve as a powerful indicator to review how a board is populated and assess whether people are hailing from the same economic and social positions or how privileged a board is. We recommend building a set of organisational definitions, which should include class, to support a board’s journey to be more inclusive. This provision should assist in creating a language to talk about the issues and power dynamics at play and, as such, should support in the creation of authentic measures to address these issues. It is important to call out negative power and inequity when it becomes visible. Afterall you cannot fix what you cannot see.

## CHAIRS AND THE OPPORTUNITY FOR ACTION

### FRESH BEGINNINGS

*“When you first become a chair there is a moment you can make some quick changes but if you leave it too long it becomes harder and people will question it and ask what is wrong with the way they are doing things. There is a bit of leeway at the beginning for a new chair to create change.”*

All the chairs we interviewed spoke about having a fresh mandate on the board when they joined or transitioned to the position of chair. This in turn allowed many to create a new kind of vision for the future and supporting strategy. One chair spoke of this strategy being accepted and supported to a high degree even though the board may not have personally agreed with it due to the fact that they shared this strategy

<sup>4</sup> 2027, About Us, [www.2027.org.uk/about/](http://www.2027.org.uk/about/)

<sup>5</sup> 2027, About Us, [www.2027.org.uk/about/](http://www.2027.org.uk/about/)

of change with the board during the recruitment process. This particular chair spoke to their recent experience in ushering in a strategy that addressed the lack of racial diversity on the board.

*“The new strategy is the lever for me to do the things that are right. But I have to carry the whole board with me, and this is the tough bit as it also alienates some people and that is what is happening.”*

Setting a new strategy or mandate when you first join a board as a chair is one way in which you can drastically change the course and culture of a board. However, it is not an easy feat and, as one chair shared,

*“I have lost trustees along the way by having conversations that people don't want to have”.*

This is part of the process and, for change to really come, some people have to step down or aside to create space for new people with a new agenda.

## THE HUMAN TOUCH

With no adequate induction, many of the chairs we spoke with had to teach themselves the ways of the board. Interviewees shared that key to their success, in lieu of such support, was gaining the respect, trust and understanding of the trustees on their board through building strong personal relationships with them. “I always sought to find out a description of whoever joined the board and who they were as a person. I always remembered people’s birthdays and sent a personalised card.” This kind of approach can go a long way to building a strong board with a high level of cohesion.

Most chairs also spoke of the benefit of having regular access and contact with the organisation’s staff team. The opportunity to gain advice from staff teams and better understand the organisation’s work went a long way in making chairs feel supported and connected with the organisation.

Within the group of chairs we spoke with it was clear that a good chair needs to build strong relationships with people to create an effective board. By building relationships of strength, a chair spoke of how they felt more confident to check in regularly on a personal level with how trustees feel about the board. They established trust to encourage bidirectional feedback about the way the culture and work of the board was experienced by the trustee. In addition, through such trusting relationships the chair was also able to receive feedback on the way in which they had or had not accommodated the needs of trustees.

*“It is important to ask board members how they feel about the board and continue to check in about how they feel around the board’s inclusivity. This needs to be done in a structured manner and regularly.”*

## GOOD CHAIRS

We were extremely lucky to speak to a cohort of chairs that are all extremely passionate about being the best chair they can be. The group were extremely honest in sharing what they think makes a good chair and we include some of the key takeaways below as to their thoughts on what makes a good chair:

*"Somebody that has the general trust of all the trustees and a sense of vision of where the organisation is and needs to go. The chair has to listen, and needs to be a convenor to draw the skills out of the trustees. Good listening capacity and having a good sense of what is going on is key."*

*"It is about your personal relationships and how you connect with people. You will find that with any board, everyone wants to do good but everyone has different contributions ... however, you have to encourage that trust in others. You have to be very honest and open about issues whilst communicating in clear and effective ways ... Being a good chair is about finding enough social interactions to connect over. We tend to do two-day meetings and have dinners together and also encourage trustees to visit the activities that the organisation works on."*

*"Limited time is a real issue for chairs, you often have to time and plan the agenda well because some issues just have to be done, e.g. housekeeping, but you need to find time to really talk about certain issues and create space. You have to get this delicate balance right. Sometimes it works, and sometimes it doesn't. A lot of this is about watching body language. There are a lot of people that are very shy at contributing and you know they have things to say so need to carefully watch to draw them in."*

*"The role of a good chair is a bit like music. You, as the chair, along with the Chief Executive, choose the music that will be played at the next meeting. Some things occur every month which you know will be there, but there are other things that are topical or cyclical and you decide whether you better have a look at that. Then you have to conduct the orchestra."*

*"We start every board meeting with a CEO of a small charity that we are supporting sharing for 20-30 minutes what the world is like for them and the people they support. This rooted the board in its purpose and reduced the distance between them and who they serve. We also ask all of the trustees and senior leaders in our organisation to share what they have done for their cause since the last meeting... I don't want board meetings to be executives reporting to non-executives and then criticising them. I want it to be about your job, my job and our job, it is about reputation risk, strategy and so much more. I also keep an eye on who is doing a lot and who isn't, or who is doing too much and working more like an executive."*

*"The combination of authenticity and realism on both sides and the ability to have tough conversations in a warm and friendly way go a long way in supporting trustees to thrive at board level."*

*"Somebody who is objectively distant, critical of the work in a challenging and highly analytical way. You want an outside macro perspective of the work. You need to be committed to the cause. Many sit on boards for the clout because it is a good board position; that is what you do not want. They should be very aware of the power they hold and discharge it responsibly and be aware of their limitations, e.g., when trustees pretend to be legal and finance experts, you should just get the services of a lawyer or accountant."*

*"I think the chair should be facilitating ... like really holding court. I have witnessed some brilliant chairs who understand that they need to facilitate and create space, really thinking about how people take part. When you think about the drop off rate of people of colour on a board, it is clear that something is going wrong with board culture."*

# RACE AND BOARDS

## WHAT IS THE SITUATION

In the aftermath of widespread coverage of police brutality against black populations globally, the summer of 2020 opened up a conversation about race and racial injustice in all sectors. The grant-giving sector was no exception. We have begun to have more in-depth conversations that are long overdue and that are beyond representation, however, this is an uncomfortable conversation for many and one that has pushed people to the limits of their understanding of diversity and the term BAME. Whilst we welcome a new commitment to tackle the racial diversity deficit in the sector, we urge organisations to pause, to listen, to learn and to reflect before acting in ways that unduly cause damage to black and brown communities, including those within their staff teams.

We see a predicament where many grant-giving bodies are more concerned about potential PR implications of inaction on diversifying their boards on the lines of race. We do not say this to undermine some very well-meaning commitments, we say this to speak to the reality. For people of colour in the UK, these issues are not new, nor have they been invisible. They have always been their reality and it is important we do service to the brave people that have spoken up and whose energy has created this moment of consciousness for the majority. We now need to commit to not simply allowing this to be a momentary commitment for the sector, but rather a deep concerted and continuous journey that we take together.

*"I think a lot of these institutions don't actually want diversity because they don't really question themselves as to why they don't have it. They do not think about what they have to sacrifice to engage authentically. I feel like they talk about diversity just to be nice."*

## THE REALITY

The reality is that over 99% of boards in the grant-giving sector are white in contrast to the communities which they serve. This is not new. There also aren't enough black and brown chairs in the sector.

*"There aren't enough Black and Asian chairs, and chairs are key to how boards operate and how they recruit CEOs. If you have chairs that are all the same, chairs can be around on a board for over 20 years, and they are unlikely to have a big impact on changing the diversity of boards. I would want chairs to acknowledge that diversity and inclusion are a priority and should be at the heart of what they do."*

Many historic trusts and foundations derived their wealth in the colonial era through the slave trade and this has only begun to be discussed in relation to a clear moral duty to decolonise their organisations and commit to eradicating racial injustice internally and in their grant giving.

Organisations such as FFUK (Future Foundations UK), POC Impact and Charity So White have been central to supporting and promoting the voices of people of colour in the grant-giving sector. Together these organisations have created a number of reports and recommendations to support trusts and foundations to lead the change that the charity sector deeply requires.

However, these are activist, community-led organisations and the responsibility for structural change must not fall to them alone. Progress is slow and, in a large part, shallow, because those with decision-making and financial decision-making power are overwhelmingly removed from the realities this report has in part explored.

## **BUILDING SOLUTIONS TOGETHER**

Looking towards the solutions, we may be keen to rush ahead with diversifying our boards at speed. However, we should pay homage to the age-old phrase “nothing good comes easily, it takes time”. This may sound rather cliché, but it is true. Over 500 years of racial discrimination will not end simply by putting black and brown faces on a board; far from it. Any change needs to first be embedded in an ongoing journey of education, reflection, listening and learning how to receive feedback/criticism.

Many of the interviewees of colour we spoke with shared that many boards hired them to be a trustee as part of a drive to change the look of their board, but in reality did very little to address the structural racism within their organisation. As such, many first-time trustees from non-white backgrounds found themselves working within in a culture that had not done the relevant work to understand what barriers existed within their organisations to attract talent of colour. From this perspective it was shared that these organisations and boards did even less to ensure that there was a culture that supported people of colour in their trusteeships.

It is important to reiterate that anti-racism needs to be at the heart of any efforts to racially diversify boards, representation is only part of the solution. What is perhaps more important is the need to understand and acknowledge the structural racism and complicity in such deep-rooted oppression that created a situation where there are, for example, no people of colour on your board, yet you serve communities made up predominantly of people of colour. As such, any change needs to be thoughtful and thorough but must consult experts in the process.

## SOLUTIONS TO RACIAL DIVERSITY ON BOARDS BEYOND GETTING MORE BLACK AND BROWN FACES ON BOARDS

Action for Trustee Racial Diversity believes that it's absolutely crucial to change the face of trustee boards by facilitating the recruitment of 10,000 more Black and Asian trustees. This would raise the figure of Black and Asian trustees from currently 8% to the UK Black and Asian population figure of 14%. The effort required to achieve this must not be underplayed. Any aspiring Black or Asian trustee seeking to apply to a trusteeship and seeing a sea of predominantly white faces on the charity website would think twice before applying. How a charity sells itself in those circumstances and portrays its genuine commitment to a more racially diverse and inclusive board is paramount. It must focus on the skills and expertise it needs to be a more effective organisation whilst also recognising that, by identifying and reaching out to a wider pool of skills and talent, it's much more likely to improve its perspectives and decision making, its creativity and its relevance to its service users and their communities.

Reaching the promised land of true diversity and inclusion and ensuring recruited trustees stay is neither easy nor comfortable for the vast majority of charities - nor should it be! It requires boards having an honest and open discussion about how they view diversity and inclusion; what they find uncomfortable, hard to confront or to ask direct questions about. Boards must – consciously and conscientiously – listen and take heed of everyone within the Board, respecting colour, gender, age, class or sexual orientation. That's the challenge!

### **Action for Trustee Racial Diversity**

Action for Trustee Racial Diversity is a campaign founded by Malcolm John to address the longstanding under-representation of people from Black and Asian backgrounds on charity trustee boards across the UK. It aims to achieve this by providing charities with resources, networks and specialist advice to enable them to take practical steps to increase the racial diversity of their boards.



## DIVERSITY EQUALS REPRESENTATION NOT INCLUSION

Recruiting Black people onto boards is a crucial first step in the right direction but alone it is not enough. Often, a heavy focus is placed on recruitment practices and increasing representation; however – without changing the culture of the charity, foundation or social enterprise – there is a high risk that newly recruited Black trustees will ultimately end up leaving due to the environment not being conducive enough for them to stay on.

For example, micro aggressions are often hard to define or challenge, but can make Black people feel marginalised and isolated. This can persistently wear down Black people in the workplace and on boards, and, if left unaddressed, can play a role in that person leaving an organisation, or even the charity/social impact sector altogether. Likewise, the 'over professionalisation' of boards creates an environment that side-lines Black trustees from working class backgrounds who: may never have worked in a professional environment before; may not have sat on a board before; may not be familiar with sector jargon; and, in some instances may not be confident reading through very detailed text.

Furthermore, systems of inequality often replicate themselves; therefore, people of colour who have developed experience and resilience working in white professional environments are the most likely group to be recruited and retained on boards. Therefore, given that we exist in an inherently unequal system, active work is required to ensure both the meaningful recruitment and inclusion of Black people, particularly: Black people with disabilities; Black women; the Black working class; and other Black people at the sharp end of inequalities.

### About

The Social Practice Academy aims to facilitate the creation of leadership development and social entrepreneurship opportunities for young women aged between 18 and 30 from Black, Asian and other minoritised ethnic communities. Through the flagship programme, Beyond Suffrage, the Social Practice Academy trains and supports young women onto charity boards – and is working to substantially increase representation by 2030, in line with the United Nations' Sustainable Development Goals.



# SERIAL TRUSTEES

'Serial Trustees' are those trustees who we define as having sat on a number of boards across the charitable sector, but not exclusively. We see this group of trustees as having a great deal of insight into the culture of boards whilst also playing a key role in either protecting prevailing board cultural norms or challenging them in order to create more inclusive boards. In total we would class ten of the trustees we spoke to as serial trustees. The majority of these serial trustees experienced high levels of comfort in board environments, they were largely confident in governance and accountability, and understood well the responsibilities of their role. They largely felt at ease in asserting both themselves and their views into board discussions. Therefore, we see a huge opportunity for action on making boards more reflective and inclusive spaces by serial trustees.

It is also important to mention that being a trustee can often be an extremely lucrative role outside of paid career opportunities. Trusteeships allow people to network, grow a name for themselves and ultimately consolidate power. It is important to acknowledge that power concentration and power consolidation are core causes and symptoms of structural inequality. As such, we see it as extremely important to not simply address the need for change to be more inclusive but also to reflect on the change needed to reduce the influence of those that have been accommodated at board level and address the norms and structures that allow for their over representation on boards.

## USE YOUR VOICE TO AMPLIFY

If someone feels comfortable on a board, it doesn't mean everyone is comfortable in the prevailing culture. Perhaps that person is not the most appropriate litmus test of inclusivity. From speaking with a number of serial trustees we heard that many have experienced difficulties in identifying whether the boards they sit on are as inclusive and reflective as possible. We share that this inability to view how inclusive a board is, or where it could be improved, is perhaps an indicator that presence of a number of trustees who have similar backgrounds, may bar the entry of new trustees from diverse backgrounds that may be better suited to understanding the levels of inclusivity on a board. The existing trustees may project an image that the board is not a place for diverse people and diverse opinions who need to see boards as places where they can create real and tangible positive change. As such, we recommend consulting with external facilitators and expert organisations to review issues of inclusivity on a board and, where appropriate after such reflection work, recruit those who are better placed to build an inclusive environment for those who a board wishes to centre or bring in as trustees.

It is worth mentioning here that someone may have started from a different place to 'traditional' trustees but then has become a more comfortable trustee as their experience has grown or may have adopted the dominant culture seen on many boards. As such, it is important that we do not assume that hailing from a different or diverse background protects you from being one of the people that hinders the inclusivity or diversification of a board.

## STEP ASIDE

As we explored in the introduction, over 99% of trustees on the boards of grant-giving organisations in 2018 were white. In order for boards to more accurately represent British society at a minimum level and to better represent the communities that trusts and foundations exist to serve, there needs to be a strong commitment to address the diversity deficit. Existing trustees need to recognise when and how they can shift power to allow for the missed expertise in the shape of first-time trustees to take up space on boards.

With limited numbers of trustees on boards, varying term lengths and a relatively small number of grant-giving bodies it is key that we look the need straight in the face. In order to address the severe diversity deficit present on boards we recommend that existing members who have served on a board for a long time give up their board positions in favour of new trustees. Whilst serial trustees are valuable, they may not be best placed to bring fresh insight to a board. Re-appointment or continued service as a trustee should be intentional and robustly justified as being in the charity's best interests, and, if not, then that trustee along with the wider board and CEO of the organisation should start succession planning to have a mix of new trustees with fresh insight and energy, alongside those who have some experience in the charity.

Many boards mirror echo chambers due to the similar experiences that many serial trustees share. In order to effectively carry out their functions around governance and accountability, boards need to challenge and scrutinise. As such, consensus and echo chambers should not always be championed in the makeup of a board. Alternatively, if asking trustees to step aside is too scary then we recommend making the table bigger to accommodate a more reflective board.

# CONCLUSIONS

What we took away from nearly every interview was the sense of responsibility the participants felt in using this opportunity to avoid someone else, another first-time trustee, feeling and experiencing the same things they did. As I hope is clear from reading this report, they came armed with amazing insight and many thoughts and ideas on what would make a better experience for more people.

The experience of speaking with chairs and ‘serial trustees’ demonstrated the complexities around changing board culture and environment due to the lack of support or often limited awareness of the needs of first-time trustees from diverse backgrounds. For chairs most visibly, there was a severe gap in support, in the form of induction. In addition, we have heard from experts working on board racial diversity that there needs to be a slowing down of actions to bring on racially diverse trustees to boards and that any such action needs to follow a period of reflection and learning.

The participants in this research described in depth the ways in which they have not felt comfortable to challenge the echo chamber of detached voices at board level. They offered many examples of how they have felt uncomfortable in an environment that comforts those of privilege, solidifying their feelings of unbelonging and difference. We argue, along with the participants of this research, that change is needed and believe that there are many ways that it can occur. For boards to become more diverse and more inclusive, we need to look deeper than physical representation and consider a wider range of barriers that are in place. We need to ensure that first-time trustees and chairs are well-supported to rise to the challenges they face and thrive in challenging environments. For real change to be achieved, boards must adopt an honest and transparent approach incorporating a practice which is open to learning, reflection and flexibility.

# USEFUL LINKS



## USEFUL LINKS

This section contains some useful links to resources that will help boards to think about their practice and how they can be more inclusive of diversity.

### Navigating boards – resources for trustees

- The National Council for Voluntary Organisations 'Board Basics' resource hub which holds a range of useful resources to help you get to grip with board responsibilities. [www.knowhow.ncvo.org.uk/tools-resources/board-basics/board-basics](http://www.knowhow.ncvo.org.uk/tools-resources/board-basics/board-basics)
- The Young Trustees Movement host a number of training events to support young people to become trustees. [www.youngtrusteesmovement.org/events](http://www.youngtrusteesmovement.org/events)
- A list of training and resources available for trustees is provided by Trustees' Week. [www.trusteestrusteeweek.org/training/](http://www.trusteestrusteeweek.org/training/)
- The Charity Commission guide 'The essential trustee: what you need to know, what you need to do (CC3)' shares what is required of a charity trustee, including your responsibilities to your charity. [www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3](http://www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3)

### More inclusive boards – resources for boards

- The National Council for Voluntary Organisations Governance Round-Up 2019 resources to support board diversification. <https://knowhow.ncvo.org.uk/governance/improving-your-governance-practice/trustee-diversity/how-to-increase-diversity-among-trustees>
- Read the Association of Charitable Foundation's 'Diversity, Equity and Inclusion: The Pillars of Stronger Foundation Practice' report which examines the grant-giving sector's relation to DEI and what needs to be done. [www.acf.org.uk/downloads/ACF\\_DEI\\_Thepillarsofstrongerfoundationpractice\\_final.pdf](http://www.acf.org.uk/downloads/ACF_DEI_Thepillarsofstrongerfoundationpractice_final.pdf)

- See 'Transforming Lankelly Chase's governance' blog post by their CEO Julian Corner which reflects upon the steps they have taken so far to grow effective governance at Lankelly Chase. <https://lankellychase.org.uk/transforming-lankelly-chases-governance/>
- See the Charity Governance Code for information to help charities and their trustees develop high standards of governance. [www.charitygovernancecode.org/en/front-page](http://www.charitygovernancecode.org/en/front-page)
- To see more on foundation diversity access the Association of Charitable Foundations' (ACF) report titled 'Foundation trustee boards: the Good, the Bad and the Data' which gives a great overview of the state of diversity in the foundation sector. [www.acf.org.uk/news/foundation-trustee-boards-the-good-the-bad-and-the-data](http://www.acf.org.uk/news/foundation-trustee-boards-the-good-the-bad-and-the-data)

## Trustee recruitment

- Reach Volunteering's guide on how to attract young trustees. [www.reachvolunteering.org.uk/blog/how-young-trustees-benefit-your-board](http://www.reachvolunteering.org.uk/blog/how-young-trustees-benefit-your-board)
- See the Getting On Board guide, 'How to Become a Charity Trustee: A Practical Guide'. Although written for potential trustees it has insights from their focus groups and surveys that may be helpful for organisations looking to diversify their boards. [www.gettingonboard.org/how-to-become-a-charity-trustee-1](http://www.gettingonboard.org/how-to-become-a-charity-trustee-1)
- See the Getting On Board guide, 'How To Recruit Trustees For Your Charity' for board recruitment support and guidance. [www.gettingonboard.org/post/how-to-recruit-trustees-for-your-charity-a-practical-guide-launches-today](http://www.gettingonboard.org/post/how-to-recruit-trustees-for-your-charity-a-practical-guide-launches-today)

## POC led organisations and networks mentioned in the report

- **Action for Trustee Racial Diversity UK**  
Action for Trustee Racial Diversity UK seeks to provide charities with knowledge, resources, toolkits, networks and specialist advice to enable them to take practical steps to increase the racial diversity of their boards. [www.atrd.group](http://www.atrd.group)
- **The Social Practice Academy**

The Social Practice Academy provides a range of online workshops that aim to facilitate the creation of board environments where all trustees can execute their responsibilities and feel confident enough to openly share the full wealth of their background, knowledge and opinions.

[www.socialpractice.co.uk/copy-of-we-support-1](http://www.socialpractice.co.uk/copy-of-we-support-1)

- **FFUK (Future Foundations UK)**

Future Foundations UK is a supportive network for minoritised racial groups working in the Trust and Foundation sector to connect, create and lead change within the space.

<https://twitter.com/FutureFoundsUK>

- **Charity so White**

Charity So White is a people of colour (POC)-led campaign group tackling institutional racism within the charity sector.

<https://charitysowhite.org/>

- **POC Impact**

POC Impact is a community run by and for people of colour in the social impact sector. We believe in the power of people to make positive and sustainable change.

[www.facebook.com/groups/pocimpact/](http://www.facebook.com/groups/pocimpact/)

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2027