

How to have a positive impact as a trustee or panel member

Penny Wilson



What we will cover

- Unhelpful trustee behaviour
- What do we mean by “impact” of a trustee?
- What do trustees need to know to be effective?
- How should trustees behave?
- Are trustees of grant-making organisations different?
- What can help trustees to be effective?
- What might Yorkshire Funders do to help trustees?



Why have you
chosen this
workshop?



What are the
ways in which
trustees behave
badly?

What are the ways in which trustees behave badly?

- Overly operational (“nit picking”)
- Disengaged between meetings
- Poor meeting attendance
- Not reading the papers
- Not listening enough/overly dominant
- Entrenched views/shutting down debate
- Know it all



What do we
mean by
“impact” of a
trustee?

What do we mean by “impact” of a trustee?

- The positive difference a trustee makes to a charity’s effectiveness, culture, direction and outcomes
 - Useful skills, knowledge and experience
 - Able to use useful skills, knowledge and experience
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- How can a trustee know if they are having an impact?

Board effectiveness: possible ways to assess

- Model self-improvement
- Open assessment in each board meeting
- Trustee contribution reviews (appraisals)
- Self-evaluation by the board
- Self-directed using tools like the DSC Governance App, Charity Excellence Framework, Charity Governance Code, NCVO Governance Wheel
- External governance review
- A mix



What do
trustees need to
know to be
effective?

What do trustees need to *know* to be effective?

- The law / the rules
- The line between staff and board (where relevant)
- The organisation's mission, strategy and work
- The people
- Your field/s
- Finances
- Stories (to be able to advocate)
- The truth



How should
trustees *behave*?

How should trustees behave?

- Respectful
- Able to engage in constructive debate
- Two ears, one mouth
- Curious / keen to learn
- Ask the right questions (and listen to the answer)
- Mission first (ego last)
- Humble
- Look for their own weaknesses and those of the board/organisation
- Speak out (bravery)



Are trustees of
grant-making
organisations
different?

Are trustees of grant-making organisations different?

- Understanding of grant-making, including current trends
- Understanding of wider context affecting grant-making
- Investment policy and ethical considerations
- Power imbalance
- Awareness of systemic inequalities (who gets funded, who is excluded)



What can help
trustees to be
effective?

Why are trustees
ineffective?



Why are trustees ineffective?

- They're not the right person
- They don't understand their role
- They think they're behaving in the right way
- They have been recruited in the wrong way
- They feel they can't leave
- They are genuinely concerned
- Other trustees make it difficult
- Practical barriers
- They don't care about the charity
- They have stuff going on their life

What can help
trustees to be
effective?



What can help trustees to be effective?

- Recruit trustees openly and strategically
- Induct effectively
- Ongoing development as standard
- Good chairing
- Use trustee terms
- Develop a trustee code of conduct
- Agree a scheme of delegation
- Good board admin, e.g. papers on time
- Spend time with the board beyond board meetings
- Engage them with the charity's work
- Help them assess themselves



What might
Yorkshire
Funders do to
help trustees?

Thank you

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