

Carmarthenshire Association of Voluntary Services

Your local county voluntary council

5. Trustees and governance

5.5 Training and development for trustees



In this information sheet the term 'trustee' is used to describe both governing body members of non-charitable voluntary sector organisations, and trustees of charities. The term 'governing body' is used to describe the different types of governing bodies found in charities and voluntary organisations.

The work of a trustee is central to the successful running of a voluntary sector organisation. An effective governing body (GB) will have a positive impact on the organisation, its staff, volunteers and service users.

Trustees need a range of skills, knowledge and qualities to do their job properly. Identifying skills needs and encouraging trustees to take up a range of training and development opportunities will improve the capacity of the existing members, and also aid in improving recruitment and retention rates to the GB.

Some voluntary sector organisations will have a role description and person specification to aid in recruiting the right person to the GB, and will ensure that induction and regular feedback takes place as part of the development process.

However, this is often not the case as it is not always recognised that trustees need support, training and opportunities to develop in the same way as staff and volunteers do.

Some of the issues that can be caused by a lack of induction, training and development for trustees include:

- A lack of knowledge and clarity of the trustees' collective roles and responsibilities.
- A lack of knowledge about the organisation, including its overall mission and what is set out in its governing document.
- An inconsistency in responsibilities - some trustees do far too much, others very little.
- Little understanding of the role of the chief officer, in relation to working with the GB.
- Ineffective meetings and and ineffective action plan.
- Little clarity in organisational policies and procedures.

The GB needs to:

- Identify need by undertaking a self assessment of their work and life situation (a training needs analysis, (TNA)) to establish where they are (A) now and (B), where

they want to be both collectively and as individuals. Such an exercise can be carried out to establish the trustees' learning needs to get from A to B, and some organisations will commission an external consultant to undertake this work. Others will find that it may be sufficient to carry out an internal skills audit of their GB to identify what skills gaps there may be, which will then help to identify what training needs the trustees have.

- Develop an action plan - taking into consideration the timescale, resources and barriers which may exist (and how to overcome them!).
- Monitor and evaluate progress.

Identifying need

The first stage in planning training and development is to **identify needs**. A training need is the gap which exists between current skills, knowledge and attitudes, and what is actually required.

There are a number of training needs which can be identified and these include the needs of:

- The organisation – what knowledge, skills and attitudes are required to meet the organisation's goals, and to fulfil the roles that are required to achieve those goals?
- The role of the GB – what are the collective skills needs?
- The individual – what are the individual skills and knowledge requirements?

Specific training and development topics might include:

- leadership
- strategic planning
- financial management
- asset management
- employing and managing people
- introduction of new policies and procedures
- legislation e.g. new health and safety standards
- new working patterns/technology
- quality improvement.

There are several approaches to developing a training and development plan for the GB, and such approaches can include questionnaires, interviews, appraisal, supervision, and problem solving team meetings.

Options for training and development

There are many options available for you to choose from to meet the training and development needs of your trustees, staff and volunteers. The best method to use will depend on a number of factors:

- relevance to the training need;
- the individual's preferred learning style and individual circumstances;
- practical matters - timescale, resources, cost, and so on.

Induction and supporting documentation

Induction is an important aspect of trustee development and should be an integral part of the organisation's process of trustee recruitment and development. It provides an opportunity to present individual trustees with details of relevant policies and procedures, and current information about the organisation, as well as a chance for the individual to ask relevant questions about his/her role. If you would like to find out more about induction you may find it useful to read another of our information sheets, 5.4 Recruitment, selection and induction.

Internally organised training courses

The advantage here is that the learning objectives of a course(s) will be tailored to meet specific needs. However, one disadvantage could be the cost to the organisation, and it may only be feasible to organise a course internally if there are a reasonable number of participants on that course.

Costs that may need to be considered include:

- A trainer
 - the trainer's fee
 - their accommodation and/or travel costs
 - other expenses
- Administration - to cover any advertising that may be necessary
 - postage, photocopying, and so on
 - staff time (possible before, during and after the course)
 - administration pre and post course, including evaluation.
- Equipment on
 - the hire of equipment such as a projector, laptop, flipchart, and so on
 - providing equipment such as pens and paper
- Venue
 - is it accessible? You may need to consider factors such as travel facilities, accessibility for those with mobility issues and/or other disabilities, whether the venue will be open at the times that you will be running the course, and so on.
 - is there adequate parking?
 - food and beverage facilities and/or costs.

Another possibility may be to consider co-hosting an event with another organisation that has identified the same/similar training needs, and sharing the cost.

External training course

This gives the participant(s) an opportunity to network with others from different workplaces/organisations.

It is, however, important to first consider whether the learning objectives of such a course will meet the specific training needs of your trustees, and whether the timing of the event fits with your overall training and development plan.

Shadowing staff in the organisation

Shadowing is an option that can allow trustees to learn about the organisation and/or a specific project or role by 'walking through' the work day as a shadow to a competent worker. Shadowing can be limited though, in that it allows trustees to observe only; direct work experience and skills are not acquired.

Mentoring

Mentoring is the process by which an experienced person provides advice, support, and encouragement to a less experienced person. A mentor is someone who leads another (the mentee) through guidance and example, and provides encouragement and support to that mentee so that they can gain the knowledge and skills needed to fulfil his/her role.

Staff away days

Inviting trustees to attend the annual staff away day presents an ideal opportunity for trustees to get to know the organisation's staff and volunteers, to learn more about the work of the organisation, and to understand more about how board or management committee decisions are put into practice.

Action learning sets

Action learning is a process in which a group of people (in this instance the trustees) come together to help each other to learn from their experience. It is a continuous process of learning and reflection with the intention of getting something done, and is centred around the need to find a solution to a real problem.

Attendance at seminars and conferences

Encouraging trustees to attend any conferences and seminars that are relevant to the organisation may be a cost-effective way of building an individual's skills and knowledge.

Using consultants / external facilitators

Some voluntary sector organisations bring in the specialist expertise of consultants for anything from improving the quality of their services or the effectiveness of their GB, to fundraising and developing new projects. Sometimes you may not know exactly what

you want, but would like an objective outsider to help you work out where you are going. If you do not have the time or the skills internally it might be time to engage some external assistance. We may be able to put you in touch with sources of free assistance, possibly including direct assistance that we might be able to offer you, but please note that we cannot make recommendations of specific consultants.

Information sheets/publications

There is a wealth of written literature – magazines, publications, web-based information, information sheets, meeting notes, and so on – which serve as an excellent source of information to build knowledge and support development.

Barriers to trustee training and development

Trustees give their time freely to an organisation so it is important to plan training and development around the individuals, and not impose a plan which prohibits participation.

Difficulties in planning include:

- Trustees having work or other commitments, thus making it difficult to identify a time to bring everyone together.
- Not everyone recognises the need for training and development.
- Individuals may be resistant to the concept of learning, the need for development or a specific method of delivery.
- Some trustees may have their own personal agenda which does not 'fit' with the organisation's identified needs.
- Issues with identifying appropriate training.
- Costs.

Further information

[National Occupational Standards for Trustees and Management Committee Members](#)

WCVA training and events, including the Courses for Communities Cymru programme, and a database of trainers and consultants

<https://www.wcva.org.uk/training-and-events>

Third Sector Support Wales

<http://thirdsectorsupport.wales/>

Disclaimer

The information provided in this sheet is intended for guidance only. It is not a substitute for professional advice and we cannot accept any responsibility for loss occasioned as a result of any person acting or refraining from acting upon it.

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