

Wales Council for Voluntary Action

Supporting charities, volunteers and communities

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 induction and regular feedback 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 caused by lack of induction, training and development for trustees include:

- A lack of knowledge and clarity of their collective roles and responsibilities.
- A lack of knowledge about the organisation, including its overall mission, constitution and governing documents.
- An inconsistency in responsibilities - some trustees do far too much, others very little.
- Little understanding on the role of the Chief Officer in relation to the GB.
- Ineffective meetings and action plan
- Little clarity in organisational policies and procedures.

The GB needs to:

- Identify need by undertaking a self assessment of work and life situation (a training needs analysis, TNA) to establish where they are now (A) and where they want to be (B) both collectively and as individuals and establish their learning needs to get

from A to B. Many organisations decide to commission an external consultant to undertake this work.

- 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 include the needs of:

- The organisation – what knowledge, skills and attitudes are required to meet the organisation's goals and the roles required to achieve these?
- 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 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.

Induction and supporting documentation

Induction is an important aspect of trustee development and should be an integral part of the organisation's procedures in trustee recruitment and development. It provides an opportunity to present the relevant policies, procedures and current information about the organisation, as well as a chance for the individual to ask relevant questions about his/her role.

Internally-organised training course

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

Costs needed to be considered include:

- Trainer
 - trainer's fee
 - accommodation and travel costs
 - other expenses
- Administration
 - to cover advertising
 - postage, photocopying
 - staff time
 - administration pre and post course, including evaluation.
- Equipment
 - hire of OHP,
 - flipchart, TV and video
 - pens and paper
- Venue
 - is it accessible?
 - is there adequate parking?
 - food and beverage

Another possibility may be to consider co-hosting an event with another organisation and share the cost!

External training course

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

However, the learning objectives may not meet the specific needs of your trustees and the timing of the event may not fit in with your overall training and development plan.

Shadowing staff in the organisation

Shadowing is an option that would 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 is limited 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 through guidance and example and provides encouragement and support to a mentee to 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 and learn more about the work of the organisation and 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, namely 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 individual's skills and knowledge.

Using consultants

Many 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 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.

Information sheets/publications

There is a wealth of written literature – magazines, publications, web-based information, information sheets, meeting notes – 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, need for development or method of delivery.

- Some trustees may have their own personal agenda which does not 'fit' with the organisation's identified needs.
- Identifying appropriate training.
- Costs.

Further information

National Occupational Standards for Trustees and Management Committee Members
www.skills-thirdsector.org.uk

On trust – increasing effectiveness of charity trustees and management committee members, NCVO, 1992
www.ncvo-vol.org.uk

How to be a better trustee, Directory of Social Change, 1994
www.dsc.org.uk

www.trusteewales.org.uk - a resource for trustees in Wales.

Database of trainers and consultants - www.wcva.org.uk

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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