



# Trustee Research

February 2024



We all understand that Trustees are imperative for the effective and legal well-being of a voluntary organisation.

This research really confirmed what many people already knew; that it's hard to recruit trustees in most cases; the average age of Trustees tends to be 50 or over, and in most cases it is over 60. There are a lot of reasons for this, mostly time constraints and the busy lives that people now lead.

One of the regularly repeated comments was about the responsibility of trustees alongside a lack of understanding of what mechanisms are in place in many organisations to protect trustees. Some of the issues which can be seen in the responses perhaps relate to very small organisations which don't have staff. In such organisations Trustees often have to take on an operational role as well as a strategic one. Perhaps there is a need to redefine some of the thinking about this. When an organisation has no paid staff Trustees should be the strategic part of the organisation, and whilst trustees may choose to act as a volunteer for the organisation in an operational role, the two should be seen as separate. This is, of course, easy to say and harder to actually do.

However, when you look at how most organisations recruit trustees by word of mouth and from trustees own networks, it's understandable that often trustees are recruited in the image of the existing trustees. While this is a safe option usually ensuring the continuation of the status quo on the board, it can lead to insular thinking and may restrict fresh innovative approaches.

There are a number of organisations which offer platforms and help to recruit trustees, but they are perceived as being London / South East centric and not really appropriate for small and very small charities. While we don't believe that this is the case for all of them that is the perception, and the organisations running these don't specifically market themselves to smaller charities. This is also not helped by the various ideas of what a small charity is. The Charity Commission designation is a charity with an income of less than one million pounds. Many people would consider this quite large.

In terms of attracting younger trustees there is the Young Trustee Movement<sup>1</sup> which is aiming to promote the idea of trustees to people under 30, although currently they do not seem to carry very many opportunities. Attracting young trustees is perhaps more difficult. This demographic probably has even less time and has much less exposure to not for profit organisations except the very large national ones. Their motivation is often different, for them it is often about adding to their CV or giving them experience to help in job applications, not an area that many small charities or organisations are equipped to support.

There was a small but worrying number of organisations that reported a lack of knowledge in their trustee board. This is worrying given the wide range of trustee training which is available from a host of organisations.

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<sup>1</sup> <https://youngtrusteesmovement.org/>

The key deficiencies identified by organisations in terms of skills were about finance and legal, which have always been difficult areas to recruit to. It was also interesting to see a large number of respondents talk about needing marketing and social media skills on the board as well as generally a better knowledge of IT and technology related matters. The lack of knowledge in these latter areas perhaps correlates with the average age of trustees, given that these things are often the domain of a younger age group (although not always). Although given that many older people confidently use technology, this supposed lack of knowledge may also be a lack of recognition of their skills and how to apply them.

Again the question about key risks only confirmed what most people would know. The key risk relates to funding and costs. Most organisations weathered the COVID 19 storm, but the issues started at the end of this period when additional support ended, and in many cases pre pandemic earnings have not yet been recovered. The current cost of living increases and the significant increases in the cost of utilities for those organisations managing community spaces have created additional financial pressures. On top of this there has been the squeeze on the public sector leading to a reduction in the length of funding and the removal in some cases of discretionary support and public sector bodies try to balance their books. It was also interesting to see a number of organisations identify the issues of succession-planning and the loss of critical personnel in this question.

## **Recommendations**

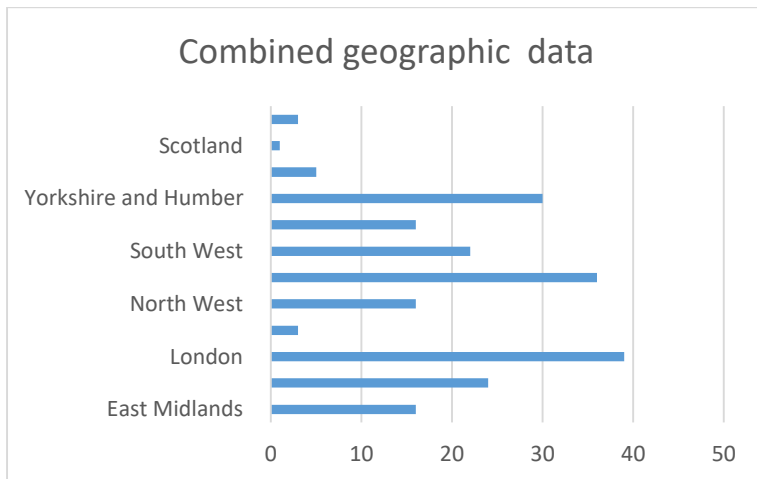
Overall what we take from this short research piece is that there is a need to support organisations to promote their trustee vacancies to a wider audience (and to accept the need to do so). It is probably necessary for all of us, as a group, to work with those existing platforms and organisations to make their resources work better for small charities, alongside this. It is perhaps worth considering an additional piece of research to see if a specific platform for small charities would be a reasonable ask, although it may be that it would not reach a critical mass to make such a project effective.

We believe that there is a need to better explain to the general public what Trustees are and what being a Trustee entails, as well as being clear what organisations can put in place to reduce the risks to trustees.

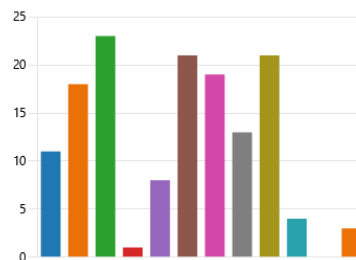
Looking at the issue of Trustee training, perhaps this is often at the wrong time of day or in the wrong format to meet the needs of people volunteering as trustees, and this should form the basis of some additional research.

## The results of the data

The latest piece of research carried out by Community Matters was to look at Trustees. We asked our mail lists to answer an anonymous survey and received 211 responses. Unlike previous research, this time we had two specific mail lists that we approached. One for Community Buildings and the other was targeting small charities with an income under one million pounds. The idea was that this would provide some level of comparison. We received a good sample across the country, with limited responses from the devolved nations. The outlier was the North East where we only received three responses, which was very different from previous calls for information.

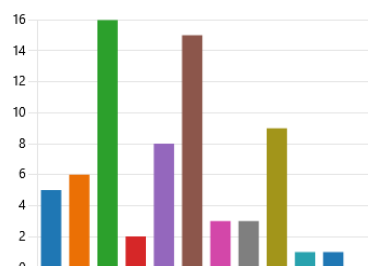


East Midlands	11
East of England	18
London	23
North East	1
North West	8
South East	21
South West	19
West Midlands	13
Yorkshire and Humber	21
Wales	4
Scotland	0
Northern Ireland	3



### Community Buildings geographic data

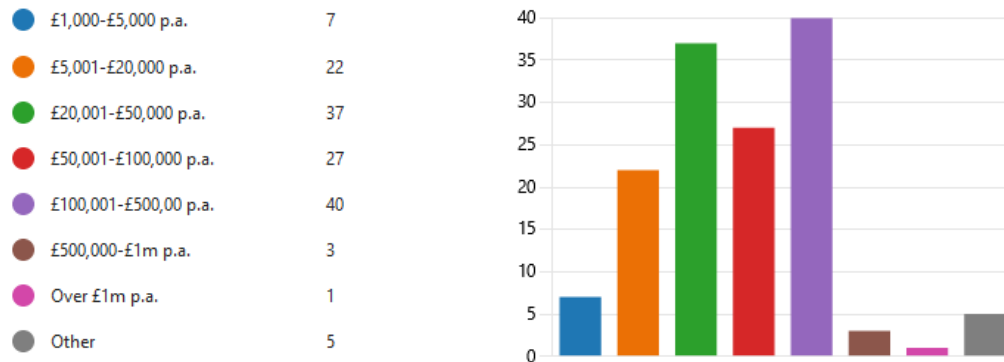
East Midlands	5
East of England	6
London	16
North East	2
North West	8
South East	15
South West	3
West Midlands	3
Yorkshire and Humber	9
Wales	1
Scotland	1
Northern Ireland	0



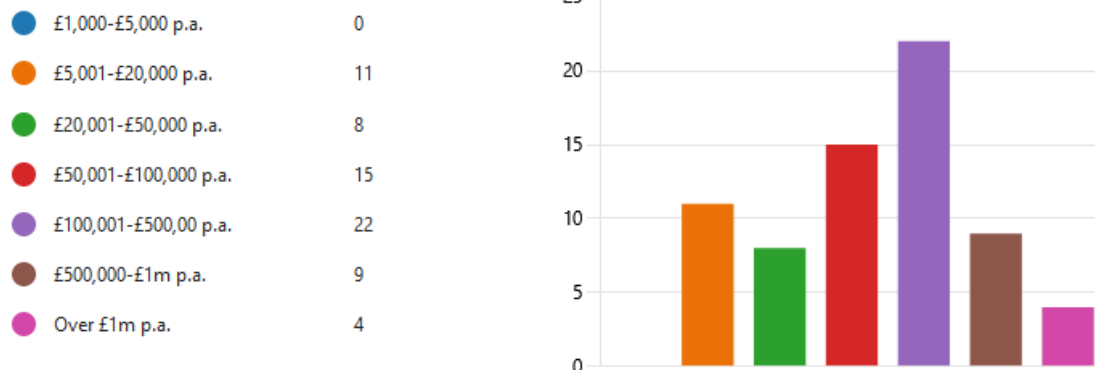
### Small Charity geographic data

## Income data

We asked organisations to identify their reported annual income in bands. Approximately 50% of the small charity organisations had an income of under £100,000. This group also had four organisations who identified their income as being over one million pounds, which would put them outside the small charity group. In the group managing community buildings nearly two thirds had an income under £100,000, and 5% identified an income of under £5000.



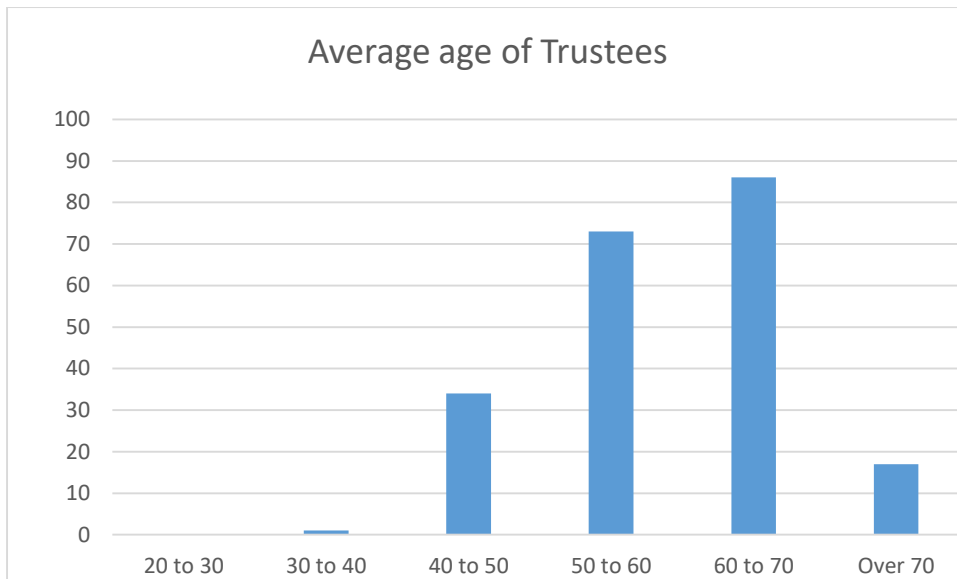
## Income data for Community Buildings



## Small Charities income data

Moving now to the more specific questions about Trustees. We asked organisations to identify the average age of their trustees.

For small charities the majority of trustees were in the 50 to 70 age range, although nearly twenty percent were in the 40 to 50 age range and only three organisations reported that the average age was over 70. For the Community Buildings cohort there was a slightly wider age spread, with one organisation reporting that the average age of its trustees was between 30 and 40. However, in this group 10% stated that the average age of their trustees was over 70 years old.



We then asked How do you recruit new trustees? Overall a majority of respondents relied on word of mouth and personal contacts. However amongst the respondents from the small charities mail list there was a greater willingness to formally advertise, in some cases using the press to do this. A number of respondents also made use of services such as Reach volunteering.

75% of respondents reported some difficulties in recruiting trustees, with a number of people identifying the issues of recruiting younger trustees and trustees with specific knowledge or experience. Key barriers to the recruitment of trustees is the amount of time required to do the job properly, and frequent incompatibility with the busy lives that many people now lead. A number of respondents also identified the complexity of the role, and now the increased level of responsibility that the role carries. There were a number of responses suggesting that people don't really understand what the role actually is, and what mitigations are often in place to protect trustees

***The final block of questions related to how well the board understood its role, documentation and risks***

16% of respondents were confident that the Board has oversight of all key issues, and that these are adequately debated

45% of respondents were not confident that the trustees collectively had all the skills and experience they needed as a Board.

The key missing skills reported were finance and legal as well as marketing especially social media, and a number of respondents mentioned IT as being a board weakness.

Only 3% of respondents had not read and understand the governing document, and the board policies and procedures. The same percentage were unsure about what governance is, and their role as a trustee in this

4% of the respondents (and all of these were from organisations running community spaces) claimed that they did not understand the charity's legal framework and the legal obligations of the Board.

8% of respondents were unclear about what the key risks are, and the action being taken to manage these.

The key risks identified are, in the main, related to funding and costs, with a number of comments relating to the short term nature of funding which creates difficulty planning. A number of respondents identified the loss of key people across the whole spectrum of Volunteers, Trustees and Staff, and following on from this, issues of succession planning. Health and Safety and reputational risk were also mentioned.

19% of organisations reported that they didn't seek the views of beneficiaries and take their wishes into account in decision making. There may be a number of reasons for this, and we did not explore this further.

15% of respondents claimed they did not regularly report to and were accountable to their stakeholders and beneficiaries.

Finally, 6% of respondents did not believe that decisions were made collectively, which were supported by all board members, including anyone who may have disagreed.

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