

GetRaising!

Increasing fundraising skills on
trustee boards



Introduction

In November 2015 Peridot Partners and The Social Change Agency held GetWired! An event that looked at how to increase digital skills in trustee boards. Bringing together the top 20 technology and digital leaders in the UK with the boards that needed them we hosted an open space session to explore the barriers and practical solutions to increasing digital skills on boards. The resulting report, GetWired! Has been downloaded and read throughout both sectors.

GetRaising! Is the second event in the 'Get' series - a series of unconference events designed to increase skills on trustee boards through bridging sectors.

The need and importance for fundraising experience and insight on trustee boards has never been higher. In light of changing fundraising regulations, the recent Kids Company scandal, as well as the ongoing need for charities to grow their income to deliver their great work, having the right skills and knowledge at Board level is crucial for survival, sustainability, and growth.

Bringing fundraisers onto Boards has a number of benefits, to both the charity and to the individual. It can help charity boards embed an informed and innovative fundraising strategy, manage risk appropriately and ensure compliance, but it is also a great opportunity for fundraisers to develop their management and strategic skills – as well as being a fantastic volunteering opportunity to get involved in a cause and charity outside of their existing workplace.

We teamed up with the Institute of Fundraising (IoF) to explore fundraisers and trusteeship in greater detail, and look to see if we could increase the skills, experience, and confidence of trustee boards by embedding fundraising expertise within them, and by doing so developing the knowledge and furthering the careers of fundraising professionals.

To kick this process off, the IoF conducted a survey among fundraisers to get their views on the areas of fundraising, governance and trusteeships. The findings showed fundraisers appreciated the value of fundraising expertise on Boards with over 90% believing that having a fundraiser on their board of trustees would be helpful in their day job. It also clearly demonstrated that this is currently lacking in many trustee boards, over three quarters of respondents (81%) saying that fundraising skills and experience were underrepresented on Boards that they had worked with. Encouragingly, the survey showed that there's an appetite and enthusiasm among fundraisers to get more involved – 78% told us that they thought that the idea of being a trustee appealed to them. We go more into the survey in the next section.

Our goal in this work is to try and draw these strands together and answer the key question: with fundraisers keen on the idea of being trustees and seeing the value and need for fundraising expertise on Boards, **why is it that more fundraisers aren't trustees?**

Why the IoF wanted to get involved:

We wanted to get involved in this work because we know how important the link between governance and fundraising is. The best and most successful charities are those that work together throughout the organisation with a common purpose and joined up approach, from the Chair, Board, and CEO, through to Directors, managers, and those on the ground. The link between fundraising teams to their Boards is fundamental to that success – fundraising delivers the income to enable charities to be sustainable, to grow, and to do the fantastic work that charities do in the UK and across the world. The more that Boards can benefit from the insight, creativity, and expertise that fundraisers can provide, the more those charities will get the right strategies in place and create the best relationships with their fundraising teams. And as the membership organisation for the fundraising profession, with over 5,700 individual members, we want to see each and every one of them be the best they can be, developing their skills and experience, so that they can have every success in their careers. This work to understand how we can remove some of the obstacles for fundraisers to become trustees is crucial and we're committed to helping and supporting our members to encourage more fundraisers to get on charity Boards.

In May 2016, The IoF ran an online survey, together with Peridot Partners, Hubbub and the Social Change Agency to gather the thoughts and views of fundraisers, receiving 300 responses from fundraisers across the sector:



78% say that the idea of being a trustee appealed to them,

while 11% said it did not and 10% weren't sure.



88% agreed that being a trustee adds skills and experience which can help a fundraiser progress in their career.



92% agreed that volunteering as a trustee is an important way to contribute to the work of a charity.



92% say it would be helpful or very helpful to have a professional fundraiser on their trustee board.

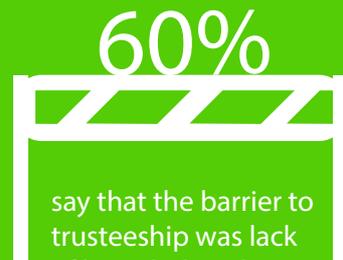


39%

say they wouldn't know where to look for trustee opportunities.



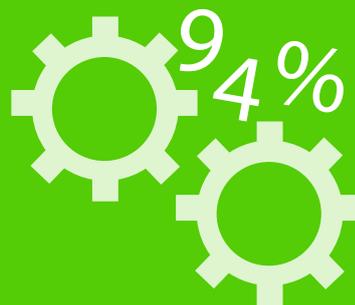
81% say that fundraising skills and experience were underrepresented on boards and charities where they had worked.



60% say that the barrier to trusteeship was lack of knowledge about the role of a trustee and how boards work.



93% have volunteered for a charity in the past.



94% agree that being a trustee can provide valuable experience and insight about how a charity works.

The Event



The GetRaising! event has solidified my decision to take up a trusteeship. More than that, as a fundraiser who is currently recruiting a charity board it was helpful to hear first-hand accounts of how to recruit and retain talented fundraising trustees.

Lydia Piddock,
Head of Fundraising,
UNHCR UK



To probe this question and to get the ball rolling, we organised GetRaising!, a joint event which brought together fundraisers and the board members, Chairs, and CEOs who need them. We were supported to do so by digital fundraising specialists Hubbub, and technology investors Balderton Capital (who lent us the space).

On the governance side, the event was attended by representatives (mostly Chairs and Chief Executives) from a range of charities, ranging from those with over £10m turnover to small £400k organisations. The fundraising community was represented by Fundraising Directors and Heads of Individual Giving, Major Gifts, Grants and Trusts and Legacy Fundraising, covering a wide range of organisations and causes. We used open space methodology to explore the following question

“How can we increase fundraising governance skills and leadership in trustee boards?”

Below is a summary of the open space discussions which arose from GetRaising! First we list the top barriers to getting fundraising governance skills onto boards, and then we set out practical recommendations for getting past those barriers. Not all of the recommendations are entirely new, but they could all be practised more widely. With the right support and attitude, we believe that some of these recommendations could be put into practice easily, while a few will need sector-wide leadership to change the system.

The Top 7 Barriers to Increasing Fundraising Governance Skills on Charity Boards



I found the event incredibly interesting, thank you. As crazy as it seems now, it's never dawned on me before that I could be a trustee; that I'd 'fit' the role, or that my skills would even be wanted. The presentations and chance to talk with fundraisers who've made that leap filled me with confidence that it might in fact be a role worth pursuing.



Sarah Ball,
Head of Fundraising
Development,
Samaritans

1. Too often, fundraisers feel that they are not the 'right fit' for charity boards, and feel that they are unable to live up to expected image of a traditional trustee; as a result, they are put off from applying.
2. The perception of time needed to be an effective trustee can be a huge barrier. Many fundraisers commented that they thought the nature of the role is not suitable for a working person. Fundraisers felt they would be unable to secure the time off work, or fit the role in with their other commitments if they were not supported to take on trustee roles by their employers.
3. Despite already working in the charity sector, many fundraisers reported that they do not know where or how to look for trustee roles.
4. When recruiting, it was felt that boards look for more traditional skills such as accountancy or legal experience, and do not consider fundraising skills to be as relevant. As a result, they can fail to recognise the valuable skills and experience of their own fundraisers.
5. Where there are fundraisers on boards, like other specialist people, fundraiser-trustees feel pigeonholed and limited to operational considerations that may restrict their contribution, or leave them feeling exploited.
6. The opposite problem can also occur, where boards misunderstand how professional fundraising should fit into wider organisational strategy. This can result in fundraising governance being taken off the board agenda altogether, reducing the effectiveness of any fundraiser-trustees or board-wide responsibility of fundraising.
7. There are both real and perceived conflicts of interest when it comes to opening up contacts and networks for fundraising. Having fundraisers on boards may only serve to enable cannibalisation of contacts and resources.

Our 18 Recommendations for Increasing Fundraising Governance Skills on Trustee Boards



I thought it was a really insightful, thoughtful and motivating event which helped to highlight the critical importance of increasing fundraising representation on charity trustee boards.



Luke Squires,
Director of Fundraising,
Bowel Cancer UK

For CEOs and Boards

- 1. Boards need to be clear about what they want from a fundraising focused trustee**, and this needs to be part of any trustee recruitment strategy.
- 2. Boards and chairs need greater awareness of the full range benefits of having fundraisers as trustees.** They can play devil's advocate, challenging and supporting received wisdom and using their insight to help bridge the gap between board members and donors. They also tend to be 'action' focused, which may help to speed up the pace around fundraising discussion and decision-making. And of course they will help to develop and drive your fundraising strategy to ensure that your charity can grow in the future.
- 3. The Chair needs to be 100% behind fundraising governance.** It must not be a tokenistic approach, or a tick box exercise, but should be embedded throughout governance processes. Boards should think about how they can give sufficient and appropriate time for discussions and decisions. Standing items on Board meeting agendas, delegated sub-groups of the Board, and pre-board meeting discussions can all help.
- 4. Charities need to consider how they can support their staff to become trustees.** Do you offer reasonable flexibility to allow employees to attend Board meetings and to fulfil that role? Is it a part of your staff development plans and HR processes? Is there an understanding of how helping and supporting staff to become trustees will also benefit your employees and your charity?
- 5. Trustee boards should review how they operate to make sure they encourage a diverse range of people do be able to be involved.** The times of meetings, or contribution expected should suit those who have to juggle work and family commitments.



I thought it a really interesting event - well run, with good, to the point contributions from the speakers. The round table discussions were lively - and reflected the scale of the challenge we have in the sector. The mix of trustees, CEOs / directors and fundraisers in the room was really useful - I look forward to seeing the report and further information on the IOF survey.



Colin Kemp,
Consultant

- 6. CEOs and Directors should talk to their fundraisers and encourage them to become trustees as part of their personal development plans.** Where CEOs are also trustees of another organisation, they should talk about it to inspire their staff.
- 7. Opportunities should be created for charity staff to meet the trustees of their own organisations,** in order to break down barriers and increase understanding of different roles. This could be done through the use of drop in sessions, “meet the trustees” seminars or even Google hangouts.
- 8. Trustees could mentor fundraisers** in their organisations to become trustees elsewhere.
- 9. Boards should consider creating fundraising sub-committees** as a useful stepping stone for fundraisers to join boards and to provide better scrutiny and governance around fundraising.
- 10. Recruitment processes for fundraiser-trustees need to state clearly what is expected in the role.** Boards should have clear terms of reference and tailored job descriptions.
- 11. The tension between being a trustee and a fundraiser in another organisation should be acknowledged and discussed** at the recruitment stage and board level. It can be managed by establishing expectations at the recruitment process and through diligent use of conflict of interest forms for trustees.
- 12. Inductions and training for trustees should cover fundraising governance.** The importance of this area should also be reflected in board meetings.
- 13. Trustees should encourage senior managers to be more willing to challenge them,** rather than staying silent out of respect for the trustee role (or concern for their prospects). This would enable better discussion around targets and expectations.



I found it deeply helpful to co-create a suite of options to try and address the challenge of lack of fundraisers at Trustee level. Sharing our experiences of working with Trustees and being Trustees provided an incredible rich conversation. It will be great to see the report.



Angharad Milenkovic,
Deputy Director of
Development, UCL

For Fundraisers

14. Trustee-fundraisers should speak with a professional search firm like Peridot Partners to explore their trustee options. As part of their search, they could also look join trustee groups on Linked-In and register their interest on websites such as www.do-it.org.

15. Prospective trustee-fundraisers should be alert to exploitation in the role. It's worth researching the fundraising activity of the charity to ensure that they are not just looking for a free operational resource. This includes asking questions about gaps in income generation, exploring what a 'step-change in fundraising' means, and clarifying whether or not the organisation wants to 'increase' income or diversify income streams.

16. Trustee-fundraisers should watch out for signs that their role is becoming purely operational. If this is the case, then trustees should raise this with the chair.

For the Charity Sector

17. The sector needs to do more to promote the benefits of fundraiser-trustees, both to fundraisers and to boards. For example, the NCVO, ACEVO and the Institute of Fundraising could do more to highlight positive case studies of fundraiser-trustees and their impact.

18. The sector also needs to find effective ways to publicise opportunities for fundraisers to become trustees. For example, the Institute of Fundraising could publish opportunities more widely, and organisations could publicise opportunities through volunteering charity groups such as Do-it.org or Trustees Unlimited.

Some thoughts from the IoF to fundraisers thinking about trustee roles:

Being a trustee can be fun, interesting, and thoroughly rewarding. But it is also a serious role and responsibility that requires commitment. Look carefully at the role and organisation when searching for any trustee opportunities to see if it's a good fit for you and your ideas. It's also really worth being prepared – have a read up and research more about charity governance and the duties of being a charity trustee – review the guidance available from the Charity Commission. In your day job, don't be afraid of bringing the idea up with your manager or HR team – your organisation may well encourage you to pursue a trustee role and offer flexible working and support. And as every good fundraiser knows, if you don't ask you don't get! And you're never too old, never too young to think about getting involved as a trustee. Charity Boards need committed individuals who care about the role and a good diversity among Board members is needed. Your knowledge and commitment, at whatever stage of your career, will be valuable and needed to charities across the UK.

Next Steps

If you are a fundraiser who was unable to attend GetRaising! but are interested in the idea of exploring a trusteeship, Peridot Partners would like to hear from you.

Equally, if you are a charity looking to recruit a professional fundraiser onto your trustee board then please get in touch, as finding and on-boarding fantastic trustees can be a complex process.

If you are interested in recruiting a professional fundraiser onto your trustee board and want to explore ways in which to onboard them, please contact **Simon Callaghan, Director – Fundraising Appointments** at **Peridot Partners** on simon@peridotpartners.co.uk or **07702 678658**.

Who We Are



Peridot Partners spends most of its time recruiting people for leadership roles in charities, both executive and non-executive. It also helps boards of trustees to become more effective by undertaking diagnostic reviews and then delivering modern solutions such as fresh induction and development programmes. www.peridotpartners.co.uk  @PeridotPartners



The Institute of Fundraising is the professional membership body for UK fundraising. Its mission is to support fundraisers, through leadership, representation, standards-setting and education, and it champions and promotes fundraising as a career choice. www.institute-of-fundraising.org.uk  @ioftweets



Hubbub is the UK's leading provider of digital fundraising solutions for the education and nonprofit sectors, helping organizations deliver mass engagement, participation and fundraising campaigns through mobile, web and social media. www.hubbub.net  @hubbubnet



The Social Change Agency specialises in creating systemic social change through consultancy, training and events, innovation and thought leadership. It creates and builds people-powered movements for change by connecting up sectors, people and tech. www.thesocialchangeagency.org  @SocialChangeAg

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