

Practical approaches maximising your board or trustee potential



This resource complements Skills for Care’s webinar focused on [Good governance: the benefits of board and trustee support](#).

It is aimed at services who either have a non-executive board or board of trustees (hereby referred to as board / trustees) and will explain how to make the most out of this opportunity. There may be some duties that your board / trustees legally need to perform, as well as other ways to benefit from their expertise and support.

<p>Comply with required standards or adhere to good practice</p>	<p>Where public bodies or charities need a board / trustees, ensure you comply with the associated standards (see government information for public bodies here and charities here).</p> <p>NCVO also provide guidance and advice about governance and trustees, including how to guides.</p> <p>Where boards / trustees are optional for your service, you may wish to refer to the good practice covered by the public and charity standards.</p>
<p>Appoint a vice-chair</p>	<p>Being a chair can be highly demanding. Appoint a vice-chair to cover for them at meetings and other external engagements.</p>
<p>Decide what needs to be brought to the board / trustees</p>	<p>Ensure your executive team works with the board / trustees to determine what is brought to them.</p> <p>Consider the type of items that are brought, the style, format these are presented etc. Ensure documentation for the board is consistently marked for info / direction / decision etc.</p>
<p>Maximise the board / trustee time</p>	<p>Clearly communicates meetings and other communications well in advance, minimising potential diary clashes.</p> <p>Provide information for meetings with enough time for board / trustees to read. Present these in an easily digestible format, highlighting key points you would like their input and insight into.</p> <p>Brief the chair before upcoming meetings. Ensure these meetings are effectively chaired and agenda items reflect current priorities.</p> <p>The agenda will vary between meetings but will often include approval of minutes from previous meetings, a focus on operational issues needing input, a look at performance, finances, compliance and risk and other strategic decisions.</p>
<p>Keep the board / trustees engaged and informed between meetings</p>	<p>It’s important to find the right balance between keeping your board informed and not overwhelming them.</p> <p>Different board members may have different preferences on such matters, so it’s useful to ask and find out what is most appropriate for them.</p>

<p>Connect board / trustees with the people you support</p>	<p>Consider representatives from the people you support at board / trustee meetings.</p> <p>Look for further ways for board / trustees to engage with people, their family, and friends through open-day type events, resident meetings etc.</p> <p>Provide ad-hoc opportunities for board / trustees to meet people when visiting the service or shadowing community visits.</p>
<p>Involve them in key communications with staff</p>	<p>Ensure that your board / trustees have opportunity to meet and engage with the wider staff team.</p> <p>Look for appropriate opportunities such as major communications and celebrations. These engagements do not need to be in-person, so make use of virtual methods, recorded messages, and written communications.</p>
<p>Look at upcoming external engagement</p>	<p>You may wish to involve the chair or other board / trustees in important external meetings, such as commissioners or stakeholders.</p> <p>Try not to overwhelm board / trustee members with these types of requests but their insight and expertise can add value and help build confidence in your service.</p>
<p>Senior team recruitment</p>	<p>Your board / trustees should support the recruitment of key personnel within your service, ideally taking an active role in senior team recruitment, interviews, and selection.</p>
<p>Involve your board and trustees in quality assurance</p>	<p>The outcome of internal or external led quality assurance, checks or CQC inspection should not to a surprise to your board / trustees. Their governance and oversight should ensure that they know how the service is performing.</p> <p>Look for practical opportunities to involve them in quality checks and reviews (e.g., taking the lead on actions following accidents and incidents) but only where these responsibilities relate to their skill set.</p>
<p>Task your board / trustees in helping lead service improvement</p>	<p>Board / trustees members are particularly valuable in supporting periods of transformational change.</p> <p>Their experience and expertise can advise on these processes, but some care providers benefit from involving members in a more active role (see example here).</p>
<p>Raise awareness of your board / trustees</p>	<p>Let people know who is on your board / trustee. If you have a website, include information about who they are and how they support your service (see example here).</p> <p>By promoting this, you are letting others know you are an open and transparent organisation drawing on wider support and external expertise.</p>
<p>Regularly evaluate your board / trustees performance</p>	<p>How you evaluate the performance of the board / trustees is something that would usually be led by the chair, with support from the executive team.</p>

	<p>These processes would usually reflect on what went well / what could be improved at the end of each meeting</p> <p>Periodically survey your board / trustee and senior team for their views on how they are performing together</p> <p>If you are looking for more comprehensive change within your board or trustees, consider commissioning an external evaluation of their performance.</p>
<p>Effectively fill gaps in your board / trustee expertise</p>	<p>Most board or trustee members will join for a limited time only (often 2 to 3 years, although some look to renew their role for a second term).</p> <p>Use the opportunities or recruiting new board or trustees to review and refresh any skills gaps.</p> <p>Read more in our Practical approaches to board or trustee recruitment and induction (available here).</p>

Further information and advice about Good Governance: The benefits of board and trustees is available from:

www.skillsforcare.org.uk/RMwebinars