


Exercises using the Code

– for learning and development

Exercise 7 – Your role on the board

 (30 minutes)



Compliance:

This helps comply with D (development and support), E (performance appraisal)

About this exercise:

This short exercise helps individual trustees consider their own role and contribution to the board. It can help identify training or support needs. It can also form the basis for an individual trustee appraisal.

Learning objectives:

As a result of this exercise, participants should be able to plan individual development, training or support needs.

You need:

handout, flipchart, pens

Leader preparation:

Familiarise yourself with the exercise. Try out the exercise yourself.

Make copies of the handout.



How to:

- 1. Introduce the exercise.**
- 2. Divide the group into pairs. Ask each pair to complete the questionnaire individually.**
- 3. Ask the pairs to swap their findings and discuss with their partner.** Ask them to identify: how would you like to learn more about “no” scores? Be ready to feed back one or two points that apply to whole board (e.g. both of us need to know more about our personal liability).
- 4. Collate learning areas.** Discuss how the gaps in learning could be filled – for example, organising a session for the board; linking up with another organisation; contacting the local Council for Voluntary Service.
- 5. Optional discussion:** Are trustees interested in using the questionnaire as part of an individual appraisal, once a year, in discussion with the chair?

Handout *Your role as an effective trustee*



Twenty questions for you to consider (you should be able to answer “yes” to most of them – or be ready to learn more – if you want to be effective as a member of your organisation’s board)

	Yes	No
1 Do you have a copy of the organisation’s governing document?	<input type="checkbox"/>	<input type="checkbox"/>
2 Are you clear about the organisation’s aims / purpose?	<input type="checkbox"/>	<input type="checkbox"/>
3 Do you know what the organisation’s legal status is?	<input type="checkbox"/>	<input type="checkbox"/>
4 Do you know what the legal responsibilities of the board are?	<input type="checkbox"/>	<input type="checkbox"/>
5 Do you know what entitles someone to be a member of the board?	<input type="checkbox"/>	<input type="checkbox"/>
6 Do you know what your personal liability is as a trustee?	<input type="checkbox"/>	<input type="checkbox"/>
7 If you represent another organisation, are you clear what your role is?	<input type="checkbox"/>	<input type="checkbox"/>
8 Do you observe the rules governing meetings and decision making?	<input type="checkbox"/>	<input type="checkbox"/>
9 Do you know what to do if you have a personal interest in the outcome of a decision?	<input type="checkbox"/>	<input type="checkbox"/>
10 Do you understand what collective decision-making means?	<input type="checkbox"/>	<input type="checkbox"/>
11 Are you sufficiently informed about the activities of the group in order to take part in decision-making?	<input type="checkbox"/>	<input type="checkbox"/>
12 Do you put forward items to the chair for the agenda?	<input type="checkbox"/>	<input type="checkbox"/>
13 Do you put time aside to read the paper work sent out by the group?	<input type="checkbox"/>	<input type="checkbox"/>
14 Do you get to meetings on time?	<input type="checkbox"/>	<input type="checkbox"/>
15 Do you actively contribute in committee meetings?	<input type="checkbox"/>	<input type="checkbox"/>
16 Do you respect other members even if you disagree with their views?	<input type="checkbox"/>	<input type="checkbox"/>
17 Do you put aside personal differences you may have with another member when you come to meetings?	<input type="checkbox"/>	<input type="checkbox"/>
18 Do you volunteer to help with tasks outside the meetings?	<input type="checkbox"/>	<input type="checkbox"/>
19 Do you make every effort to attend, giving your apologies when you are unable to?	<input type="checkbox"/>	<input type="checkbox"/>
20 Do you take time to make new committee members welcome?	<input type="checkbox"/>	<input type="checkbox"/>

(adapted from a questionnaire provided by Richmond Council for Voluntary Service – original source unknown)



This handout can be downloaded from
www.governancehub.org.uk