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The Future Charity Chair: A research project



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Steering Group and research team

Without the guidance and support of numerous individuals it would not have been possible to complete this research.

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About the research team

The research was co-led and conducted by Véronique Jochum and Leila Baker, including the design of the research methodology and the development and reporting of the findings and conclusions.

“At the Association of Chairs, we champion the importance of Chairs in supporting charities and making a thriving civil society possible. We also know just how much the burden of Covid 19 and the cost-of-living crisis has fallen on Chairs as well as their boards. We know that Chairs often feel unsupported and don’t know where to turn. We really welcome this report and its emphasis on developing the skills and competencies of Chairs, and its approach in looking at the challenges ahead for Chairs over the next 10 years.”

Joe Saxton
Chair, Association of Chairs



Foreword

I have long admired the Centre for Charity Effectiveness (CCE), and go back a long way with their groundbreaking charitable work so I am delighted to introduce this important report on the Future of the Charity Chair. I would firstly like to thank Bayes CCE and the great collaborative partnership of organisations that made this research possible, and all those who contributed and took part to such effect.

I have chaired charities since 2006 and worked in and around the charitable sector all my working life, mainly concerned with social justice and the poorest communities. I have seen charities through a number of lenses – as a frontline volunteer, as a charity chief executive reporting to a business led board, as a founding trustee, a new Chair and sometimes as an honorific- titled cheerleader – Patron, Vice President etc. I have always hugely valued and recognised the incredible work and range of charities, both large and small, in addressing some of the most pressing issues we face. I am particularly inspired by the thousands of individuals who give their time to make the work of charities possible, and a Chair of trustees’ role is a very powerful example of this contribution.

Through chairing charities of all sizes and observing as a trustee, I know at first hand the scale of responsibilities that a Chair takes on, but equally the immense personal fulfilment that this role can give. It is the Chair who takes on a unique and voluntary leadership role, resolutely focused on achieving the purpose and leading their fellow trustees to ensure their organisation’s sustainability.

This research project has given clarity on how charity Chairs see the future, certainly challenging but with

glimmers of light and optimism. It shares their perceptions on the future skills, expertise and behaviours that will be required and support that will be needed. It rightly questions where the pipeline of future charity Chairs will come from if we, as current leaders, don’t think forward, adapt and evolve. Its key findings, for me, relate to innovation, developing the future talent pool of charity Chairs and the perennial challenge of collaboration and connectivity.

Firstly, for charity sustainability there needs to be ongoing innovation. The most impactful charities understand that innovation is best done through diversity and diverse experiences. Therefore, how a Chair is recruited and how they recruit talent and lead their board, will make all the difference to whether a real diversity of views is heard. Boards comprising people of different ages with different experiences and from different backgrounds, will develop the broadest view of the challenges and opportunities the charity faces. A key role for the Chair is get the welcome mat out for those who could make a profound difference to the purpose and the board but need encouragement and practical support to take a trustee role

and develop their leadership trajectory.

Secondly, the report confirms that the status quo will need to change if the next generations of Chairs are motivated to take up the reins of leadership. Through my work with the #iwill campaign I am struck by the passion that the younger generation have for many causes. But passion alone is not enough to overcome barriers that inhibit participation in charity governance and fewer than 2% of trustees are under 25. This report rightly identifies that a younger generation will be looking for different forms of reward, recognition, and support which meet a wide variety of needs. Further research and focus into motivation, recognition, and reward in its broadest sense is vital if we are to build and secure a free-flowing pipeline of potential charity Chairs.

Thirdly, the need to “connect the unconnected”. This means, of course, connecting Chairs with each other for peer support but also working hard to connect our charities to the wider communities and stakeholders that influence our purpose and achievement. This can bring greater and more creative collaboration and help to open doors to pools of future talent to build the Chair pipelines.

Julia Cleverdon

Dame Julia Cleverdon DCVO CBE

Executive summary

Charities play an undeniably crucial role in our society, and as leaders of the organisation Chairs are critical to their success. Despite the rapid and unrelenting pace of change and the continued economic and political uncertainty, the sector has continued to deliver, innovate and show extraordinary resilience.

Recent reports across all sectors, such as *The Future of Charity*¹ by Good Innovation, *Chair of the Future: Supporting the next generation of business leaders*² by Deloitte and *The Chair in Government*³ by the Public Chairs Forum and Nous, have drawn attention to a knowledge gap regarding the specific role of Chairs in helping their organisations deal with the repercussions of these far-reaching challenges and find potential solutions.

Charity Chairs, who are at the very heart of charity leadership and governance, play an essential role in shaping how charities respond to opportunities and challenges and ensuring they are sufficiently resilient and impactful. However, while there has been plenty written that focuses on effective boards, the trustee role and the Chair's relationship with their CEO, there has been less focus on the important and distinctive role of the Chair.

In the light of this, this forward-looking report seeks to establish a greater understanding of what skills, behaviours and attributes Chairs will need from the next decade and beyond, if they are to provide sufficient organisational oversight and

stewardship. To effectively navigate what is to come, the role of the Chair and Chairs themselves will need to evolve and develop. The research underpinning the report sought to understand how the role of the Chair might be reimagined to meet those future needs.

The aim of this report is to contribute ideas that will help to shape the future development and recruitment of charity Chairs, to highlight longer term considerations for board discussion and provide fresh thinking to positively influence the regulation and best practice guidance for the sector.

The qualitative research behind this report, gathered the voices and experiences of 61 charity Chairs in England and Wales together with 23 representatives of organisations that support them. Guided by the expertise within the project Steering Group, the researchers conducted in-depth interviews with Chairs followed by seven facilitated group discussions.

The findings are grouped under three sections: How do charity Chairs see the future? What will their role look like and how will they need to be recruited and supported?

The research highlighted that within the context of trustee collective responsibility, the Chair's role was seen as a leadership role, that there were a wide range of motivational factors for taking on the role and that it was positioned as lending itself to a range of models of leadership that emphasise sharing power, inclusion and collaboration.

Challenges were identified in balancing the demands of the current environment with the need to future gaze to maintain a robust and sustainable organisation.

Chairs saw the future as increasingly volatile, complex, and uncertain and acknowledged the toll on those in positions of leadership. There was predominantly a focus on the present and the near future, and on challenges rather than opportunities. Some Chairs saw challenge and opportunity as intrinsically linked with many agreeing that there has been an "intensification" of the role.

Appetite was shown to trial more flexible ways of governing, to better equip charities to deal with times of crisis or uncertainty. There is a need to explore in more depth what motivates the younger generation of future Chairs, any barriers to engagement and the concept of recognition and reward that goes beyond the remuneration debate. Equity, diversity, and inclusion were considered paramount with equal emphasis being required on all three parts.

Participants talked about a wide range of development needs covering knowledge, skills and behaviours and these were mostly positioned to meet current and known trends and drivers of change.

We concluded that being a Chair is a **rewarding but demanding leadership role**, and one that will need to evolve if it is to sit comfortably with the changing world in which charities find themselves. It is a role that is suited to a diverse range of leadership models, that needs to continue to be made aspirational, aligned with today's social purpose discourse and with power and leadership reframed in this context.

The **pipeline** of future Chairs is a real concern. To achieve a healthy flow of Chairs, the sector will need to look harder at how to "open up" boards, who their future Chairs could be and where they will be found. There is no template

¹ *The Future of Charity* – Good Innovation, 2023 [Last accessed 18.03.24]

² *Chair of the Future: Supporting the next generation of business leaders* – Deloitte, 2023 [Last accessed 25.04.24]

³ *The Chair in Government*, Public Chairs Forum, 2022

for stepping up and into the role, at present the onus is frequently on an individual getting themselves into a ready position. Development pathways towards the role need to be explored in the context of the next generation of Chairs and their potentially different support needs.

Finally, any **support** for Chairs needs to be both near term and future-focused. There are some gaps that need addressing. This is particularly the case for leadership development, foresight skills, AI transformation and equity, diversity and inclusion.

Following the research conclusions, the Steering Group recommendations in this report provide some potential solutions to the gaps identified. Immediate change could and should be implemented to better support existing Chairs and develop a much-needed pipeline.

- The role of Chair is a leadership role – recommendations include a leadership development programme, ongoing training and peer support and further cross-sector research on models of governance that could lend itself to more flexible leadership styles.
- The role of Chair is a role to aspire to – recommendations include a change in the promotion of the role using Trustees' Week to highlight

best practice, and further research to understand reward, recognition, and motivation as it pertains to the role of charity Chair.

- The pipeline of future Chairs is a real concern – recommendations include changes to recruitment practices, board succession planning and internal development pathways. We have also included some specific tips for the recruitment of Chairs.

Developing our charity Chairs must begin now if we want the sector to be fit for the future.



“When the relationship between CEO and Chair is founded on shared values, shared focus on the mission, a commitment to agile and impactful governance and open and honest communication, the impact can be immeasurable – it is the rocket fuel by which even the smallest or most under resourced organisation can fly. Understanding the role of the chair as it could and will be, rather than just assuming that what has gone before is fit for purpose is of crucial importance to all of us who believe in and are committed to the future of civil society.”

Jane Ide OBE
CEO, ACEVO

The findings

Part 1: Introduction

This report looks at the role of future charity Chairs and the skills and attributes they will need to embrace for the sustainability and impact of the charity sector in 2033 and beyond. It is aimed at current Chairs, potential future Chairs and, more generally, trustees as well as support organisations, funders and policy makers.

The report concentrates on the perspectives of Chairs, because although there is plenty of literature on charity governance, it is less common to have research that focuses on Chairs and their voices. Yet, with the CEO, the Chair plays a pivotal role in guiding charities towards achieving their mission and impact.

1.1 BACKGROUND

The last ten years have been marked by major changes and widespread uncertainty. With the rate of change showing no signs of slowing down, it is widely recognised that factors such as climate change, demographic shifts, geopolitical tensions, and technological advancements will significantly transform the world in the next decade. Recent reports such as *The Future of Charity*⁴ by Good Innovation, *Chair of the Future: Supporting the next generation of business leaders*⁵ by Deloitte and *The Chair in Government*⁶ by the Public Chairs Forum and Nous, drew attention to a knowledge gap regarding the specific role of charity Chairs in helping charities deal with the repercussions of these far-reaching challenges and find potential solutions.

Chairs, who are at the very heart of charity leadership and governance, play an essential role in shaping how

charities respond to challenges and opportunities and ensuring they are sufficiently resilient and impactful. To effectively navigate what is to come, the role of the Chair and Chairs themselves need to evolve and develop. In this context, it is especially important to improve understanding of the skills and attributes Chairs need to provide leadership in the future and identify ways to best support Chairs as charity leaders.

1.2 ABOUT THE FUTURE CHARITY CHAIR

In response to this backdrop, a group of organisations with a shared interest in charity governance initiated The Future Charity Chair, a project which aims to:

- Contribute ideas that will help to shape the future development and recruitment of Chairs.
- Enhance the future sustainability and impact of the charity sector by highlighting longer term considerations for board discussion.
- Provide fresh thinking to positively influence the regulation and best practice guidance for the sector.
- Emphasise the value of good charity governance and the need for it to continually evolve to remain relevant.

The project seeks to do justice to the breadth and diversity of the charity sector by engaging with charities of all sizes and involved with diverse activities. It builds on previous work such as The Lord Mayor's Charity Leadership Programme, which aimed to foster the effectiveness of charity Chairs, and co-sponsored the publication of *A Chair's Compass, A guide for Chairs of charities and non-profit organisations*⁷.



⁴ *The Future of Charity* – Good Innovation, 2023 [Last accessed 18.03.24]

⁵ *Chair of the Future: Supporting the next generation of business leaders* – Deloitte, 2023 [Last accessed 25.04.24]

⁶ *The Chair in Government*, Public Chairs Forum, 2022

⁷ Association of Chairs (2014) *A Chair's Compass: A guide for Chairs of charities and non-profit organisations*. London: AoC

1.3 ABOUT THE RESEARCH

This qualitative research project gathered the voices and experiences of 61 charity Chairs in England and Wales together with 23 representatives of organisations that support them. Carried out between July 2023 and February 2024, the research began with a review of relevant literature and guidance; then conducted 25 in-depth interviews with Chairs before, finally, sharing emerging findings and considering their implications in seven facilitated group discussions with more Chairs and sector stakeholders. The latter included equity partners that had a focus on improving diversity in charity governance.

More detail about the approach and methods can be found in Appendix B.

Use of terms

‘Chair’ is used to refer to charity Chairs unless stated otherwise. ‘Participant’ is used to refer to all those who took part in the research whether through giving an interview or joining a group discussion. ‘Support’ organisation is used to refer to infrastructure bodies, consultants and funders that support charities, governance and volunteering.





KEY MESSAGES

- Participants talked about numerous current and future challenges and opportunities in a range of key areas including income generation, governance compliance, recruitment and retention, and digital transformation.
- Chairs saw the future as increasingly volatile, complex and uncertain. Their focus was predominantly on the present and the near future, and on challenges rather than opportunities. Small and medium-sized charities tended to have a more pessimistic outlook.
- Many of the drivers of change and trends identified were current, ongoing and still very relevant, reflecting long-term shifts. The impact of some of the more recent drivers of change and trends such as the rise of social movements and networks and the use of artificial intelligence was seen as largely unknown.

Part 2: How do charity Chairs see the future?

Participants were asked to consider the current and future challenges and opportunities facing their organisation and the charity sector. Part 2 highlights the main drivers of change and trends that underpin the challenges and opportunities participants mentioned and draws on these to explore their vision of the future.

2.1 MAPPING CHALLENGES AND OPPORTUNITIES

Participants reflected on the challenges and opportunities that the charity sector and their organisation were currently facing, and then looked to the future, highlighting what new challenges and opportunities might arise but also how existing ones could evolve.

Table 1 summarises the challenges and opportunities participants talked about.

The charity sector is not homogeneous so these challenges and opportunities varied in importance and relevance depending on whether the participants' charity was a national or local organisation, the size of their organisation and the type of activities they provided. For example, Chairs from charities involved in the delivery of public services were more likely to talk about the challenges and opportunities of the changing relationships between organisations. Likewise, Chairs from charities that involved volunteers in the delivery of their activities were more likely to talk about volunteer recruitment issues. This was particularly the case for smaller charities that had very few paid employees, and for larger charities if they were heavily dependent on volunteers.



Table 1: The challenges and opportunities faced by charities

| CHALLENGES | | |
|---|--|---|
| <p>Income generation and fundraising</p> <ul style="list-style-type: none"> Over-reliance on a limited and fragile income source Changing patterns of individual giving Fewer grants including capital grants Exploring new ways of diversifying income sources but lack of expertise and capacity in some cases Seeking more support from corporates needing to deliver on environmental, social, and governance (ESG) commitments | <p>Competition and collaboration</p> <ul style="list-style-type: none"> Growing competition for contracts, including from corporates Growing concentration of the charity sector with potentially more mergers to come Working in partnerships, particularly at a local level More thinking at a systems level | <p>Governance and regulatory compliance</p> <ul style="list-style-type: none"> Increasing demands of regulatory environment requiring a wide range of skills and expertise Regulatory environment can make recruitment of trustees more difficult |
| <p>Demand for services</p> <ul style="list-style-type: none"> Filling gaps in public service provision but often with fewer resources Growing number of service users with complex needs | <p>Equity, diversity and inclusion</p> <ul style="list-style-type: none"> Lack of diversity within charities (staff, trustees and volunteers) Growing emphasis on equity, diversity and inclusion (EDI) and the role of people with lived experience Need to recruit and support staff, trustees and volunteers that reflect communities/service users | <p>Recruitment and retention</p> <ul style="list-style-type: none"> Shortages of staff, trustees and volunteers Competition from organisations in other sectors able to offer higher salaries and other organisations with a social purpose Increasing pressures on the well-being of staff and volunteers Generational differences in terms of motivations and expectations Competition from social movements and networks |
| <p>Reputation management</p> <ul style="list-style-type: none"> Media attention on charity scandals Anti-woke/woke agendas Polarised views on social media Fake news and misinformation Charities more trusted than most other institutions | <p>Impact measurement</p> <ul style="list-style-type: none"> Increasing need to demonstrate social and environmental impact to a range of stakeholders (funders, donors, partners etc.) | <p>Digital transformation</p> <ul style="list-style-type: none"> Greater use of data to understand donors and volunteers as well as impact on service users Putting in place digital strategies that are sufficiently flexible and able to adapt to future changes Ability to think through the ethical implications of technology (particularly with AI) Lack of digital skills and literacy |

Several recurring drivers of change and trends which underpinned these challenges and opportunities stood out for research participants. These drivers and trends chime with other reports exploring the current and future operating environment of the charity sector⁸ and with the ideas discussed during a ‘futures’ workshop convened by the research Steering Group ahead of the project⁹:

- **General economic conditions** such as inflation, energy prices and interest rate rises.
- **Changes in the policy and regulatory environment** including public spending cuts, the withdrawal of statutory services, and new regulations and compliance standards.
- **Shifting relationships within and across sectors** with the blurring of sectoral boundaries and the growth of organisational hybridity whereby organisations combine different structures, processes, strategies from different sectors.
- **Demographic trends and patterns**, in particular those linked to an ageing population and migration (both internal and external).
- **Growing need and inequalities** associated with austerity measures affecting the delivery of public services.
- **Technological advances** encompassing digital fundraising platforms, social media, remote working tools, and artificial intelligence.
- **Climate change and environmental sustainability** particularly in terms of changing organisational practices and improving environmental footprint.
- **Shifts in social attitudes** including the erosion of trust in institutions, increased demand for transparency and accountability, greater expectations around equity, diversity and inclusion, and changing perceptions of how social change can be achieved.
- **Evolving volunteering patterns** with a growing number of time-poor volunteers drawn towards more flexible and short-term opportunities.
- **Evolving workforce patterns** with people increasingly wanting opportunities that offer flexibility, remote work options and a good work-life balance.



⁸ [Future of charity](#) [last accessed 26.04.24]; [The future charity](#) [last accessed 26.04.24; [Road Ahead 2024](#) [last accessed 26.04.24]; [State of the Sector 2024: Ready for a reset](#) [Last accessed 26.03.24]

⁹ [Future Charity Chair write-up August 2023](#) [Last accessed 26.04.24]

2.2 LOOKING AHEAD: CHAIRS' OUTLOOK ON THE FUTURE

This section focuses on how the participants' views on challenges and opportunities impacted their general outlook on the future.

The future was seen as increasingly volatile, complex and uncertain

When reflecting on the future of the charity sector and of the charity they were chairing, participants commented on how unpredictable it had become. This is not new but recent events such as Covid, the war in Ukraine and the cost-of-living crisis had contributed to their vision of a future that was increasingly volatile, complex and uncertain. These events demonstrated how unforeseeable events that were beyond their control, could significantly impact the sector. This disrupted organisations' strategic priorities, transformed ways of working and highlighted how important it was to stay flexible and adaptable in an interconnected world that could see situations change very quickly.

"...the job of leaders was not about sitting there trying to crystal ball gaze, but it was actually about accepting that you are going to have to be better at dealing with that volatility and that uncertainty."

"I even query organisations' 10-year strategies now, because there's no way of knowing what's going to happen to you in 10 years' time. Hamstringing yourself to a 10-year strategy, three years is hard enough."

"It's kind of an incremental, iterative strategy. We're really good at it and I think that's why we're able to respond to events, handle those well."

The focus was predominantly on the present and the near future

Participants were far less comfortable talking about the distant future which framed this study. They focused on the present, fulfilling their immediate responsibilities and responding to sudden or critical changes or events. Generally, the participants directed their attention towards the immediate demands of their operating environment, and the short and medium-term factors within their control. Where they were looking ahead, their focus was on the near future, largely on changes that were already affecting their charity and that were likely to continue to do so in the coming years. This informed their organisational strategy which typically had a three-year timeframe. Some Chairs commented on how important it was to be constantly revisiting and adapting the strategy and saw strategic planning as an iterative and evolving process.

Chairs were preoccupied by current and future challenges

There was a general consensus among participants that the current operating environment for charities was difficult, and most anticipated this would continue in the future. Overall, they focused on challenges rather than opportunities. They had real concerns about access to resources whether it was financial resources because of changes in public spending, grant-making and individual donations, or human resources with issues around recruitment and retention of staff, trustees and other volunteers. This was particularly the case among Chairs of small and medium-sized charities, who tended to have a more pessimistic outlook. Participants also had concerns about wider political or social trends such as the greater polarisation of opinions, and the erosion of public trust towards institutions that contributed to an environment that they perceived as increasingly suspicious or unfavourable towards charities.

Despite these shared concerns, some Chairs were more positive about the future than others. These Chairs were more inclined to consider challenges and opportunities as intrinsically linked and felt their organisations were well placed to respond to and build on current and future challenges. For instance, in a context of growing competition for funding, some Chairs valued the potential of more cross-sector collaboration and partnerships. They saw the challenging environment as an opportunity to innovate and find creative ways of meeting needs. They also reflected on charities being well placed to address societal issues because of their mission-driven focus, community connections and personalised approaches, highlighting that the sector had a long history of adapting and changing over time. They valued the work they had been able to achieve with others and seemed more optimistic about the change they could bring about collectively.

“There are always opportunities in these situations where it makes you think differently. It forces you to think about solutions. Also, it can create a culture of courage and bravery.”



Many of the drivers and trends identified were current, ongoing and still very relevant

Much of what the participants spoke about related to current drivers and trends that had been on the radar of many sector leaders for years, even decades. These were often linked to broad, transformative shifts that can take years to unfold. For instance, the changing relationships between different sectors have been shaped by the decisions of successive governments supporting a mixed economy of welfare with service providers from the public, charity and corporate sectors. This is something that has evolved over time and is highly likely to continue affecting charities in the future. Many of these long-term trends were ones with wide-ranging impacts on society more generally rather than being specific to the charity sector. This was exemplified by the shifts in social attitudes that participants noted as well as the pervasiveness of technology.

The impact of some of the more recent drivers of change and trends was seen as largely unknown

Participants spoke about newer trends that they felt were becoming more prominent, often convinced this would be even more the case in the future. However, they remained unsure what

the likely impact of these trends would be for their organisation and the sector more widely. Artificial intelligence (AI) was considered so new that they had generally given it very little thought.

- **Increased emphasis on equity, diversity and inclusion and on bringing in lived experience** – Whether and how it would transform organisational cultures and governance.
- **More place-based working and funding** – How organisations across sectors and of different sizes would be able to work together in the provision of services within a local ecosystem.
- **The rise of social movements and networks** – What this would mean for more traditional and structured organisations.
- **Greater influence of global population movement** – How that might affect skills gaps and shortages, recruitment and retention.
- **Focus on improved environmental and sustainable working practices** – Whether they would have the knowhow and the resources to do this well.
- **Growing use of data and AI including to drive decision-making** – What the ethical implications might be for charities and how they might contribute to the debate.

“What I’ve described are trends so they will just keep going rather than being replaced by a different issue. So I think for example, being held to account, society has been moving in that direction for a long time. The internet amplifying things. So I think those forces are at work, if you will, and aren’t going away.”





KEY MESSAGES

Role

- Chairs play a leadership role in their charity and wider sector. The role could be positioned as aspirational and as an exciting opportunity that people can work towards.
- It could also be positioned as lending itself to a range of models of leadership that emphasise sharing power, inclusion and collaboration.
- These changes are achievable through more flexible ways of governing that are less landed on the shoulders of one person and respond positively to what is likely to motivate future generations.

Skills and experience

- Good relationship management skills have always been important but with each Chair finding themselves at the centre of an increasingly complex web of relationships, these skills have become even more vital. The relationship between the Chair and CEO is critical.
- Future Chairs will need to be skilled in collaboration and willing to see themselves as part of a wider ecosystem of leadership in their local area, field or subsector.
- While it was important that Chairs bring with them experience of being a trustee or other governance; it is also essential that they are willing to learn and take the time to get to know the charity they were coming into.

Attributes and behaviours

- There is a long list of ideal attributes and behaviours of the future Chair, but one person cannot embody all of them.
- A key attribute is a steadfast commitment to the cause and ability to use that to bring clarity of purpose to the board. Beyond that, charities may need different things at different times.

Part 3: What will the role of charity Chair look like?

The researchers discussed with participants what the future trends they identified might mean for the role of Chair in the future. This was broken down into: how will the role of Chair need to change in response to future challenges and opportunities; what skills and experience will Chairs need in the future; and what kinds of attributes and behaviours that will be required of them.

3.1 HOW WILL THE ROLE OF CHAIR NEED TO CHANGE IN RESPONSE TO FUTURE CHALLENGES AND OPPORTUNITIES?

The way the role of Chair is conceived, structured and talked about needs to change in order to prepare for the future, address the growing pressures of the role and present it as an aspirational and exciting leadership opportunity. Participants talked about how this can be achieved by repositioning the role, and set out what they see as the key elements of the role and its responsibilities in the future. They also identified some differences in the experience of Chairs of small and medium-sized charities.

“It’s a lot of work just to maintain the status quo. Would you decide to do long-term work?”

Growing pressures of the role

There has been an ‘intensification’ of the role of Chair; it has become more demanding, time consuming and stressful, participants said and commented that they expected this trend to continue in the future. Participants described navigating tensions, dilemmas and crises; they noted that it is not unusual for a Chair to be brought in to address a crisis. Some described it as a ‘balancing act’ where they were continuously weighing up, for example, risk management and innovation; or managing today and planning the future. For all the above reasons, participants commented on the way the role has been inappropriately promoted in the past as being “*just four meetings a year*” or as a retirement opportunity.

“The amount of time the Chair has available has a material impact on how well the charity does.”

Repositioning the role

- **Positioning as a leadership role and being open to models of leadership that enable Chairs to share power**

Being a charity Chair is a leadership role both within the charity and in wider sectors. In many charities that leadership role is shared with the CEO and other trustees. In order to move ahead, participants felt that the sector needed to be even more open to Chairs performing the role in a range of ways based on different leadership models. The leadership models that participants discussed in interviews are listed below; the first three are all about relationships which was also a strong theme in the findings about the skills and attributes that Chairs will need in the future.

Inclusive leadership¹⁰: the Chair leads inclusively, values the skills and experience fellow trustees bring to the board and seeks to support their development needs and growth. This has links with ideas around servant leadership.

Shared leadership¹¹: the Chair shares power by supporting trustees to work with one another and take on responsibilities. This has links with ideas around distributed leadership, collective and collaborative leadership.

Ecosystem leadership¹²: the Chair recognises the need for an ecosystem response to major and complex challenges and understands that they can play a leadership role in that ecosystem response alongside others.

Transformational leadership¹³: the Chair also works in ways that facilitate others, embodies the charity's values and is motivated by the charity's vision for its future. This has links with ideas around adaptive leadership and leading through crisis or change.

- **Promoting the role as aspirational and social purpose focused**

Often the role of Chair is promoted in terms of the charity's requirements; what the charity needs from them. Instead, participants suggested communicating the benefits, the offer and what people might learn from being a Chair.

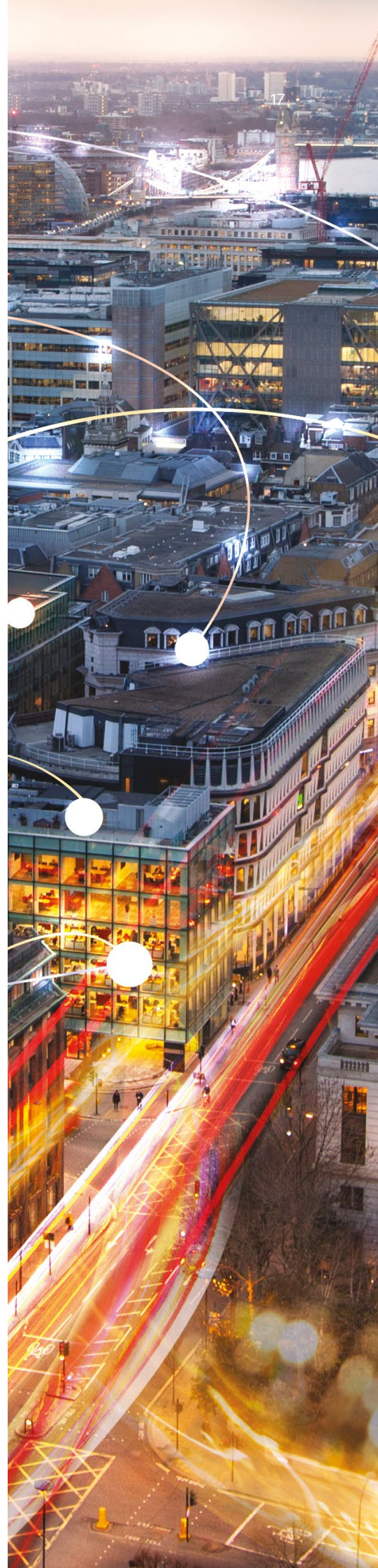
“Pay attention to what motivates Generation A.”

¹⁰ See for example insights from Pilotlight [Leading with an inclusive mindset](#) [Last accessed 28.03.24]

¹¹ For a discussion about shared leadership in voluntary organisations see Mumbi, H. and Obembe, D. (2021) Shared leadership in voluntary sector organisations: exploring practice and theory development. *Voluntary Sector Review*, 13(2)

¹² See for example ecosystem leadership discussed in Copeman, C. (2021) [Challenges in Contemporary Governance](#), Centre for Charity Effectiveness [last accessed on 26.04.24]

¹³ See for example how transformational leadership is described by [Investors in People](#) [Last accessed 28.03.24]



In addition, participants recommended highlighting the opportunity to make a difference to social change through being a Chair. The ideas behind ‘social purpose’ organisations, of ‘investing for social good’ and the BCorp movement¹⁴ were thought by participants to be attractive to a younger generation of potential Chairs who may be less attached to the charity model or sector distinctions. Participants appeared confident about the continuing relevance of the charity model but wanted to talk about its governance in ways that would attract the attention of the new generations.

- **Bringing lived experience into the board including the role of Chair**
Participants highlighted a systemic shift in thinking about bringing lived experience into charity leadership. Bringing lived experience into the board was particularly important to Chairs of charities that work with people who, more generally, find themselves marginalised, without a voice and whose experiences are poorly understood. Examples discussed in this research included people with a learning disability, and people seeking asylum.
- **In practice there are ways to structure the role so that power and responsibilities can be shared**
There were three main drivers for restructuring the role: shifting power within the charity in favour of those most closely affected by its cause or mission; addressing diversity in the charity’s governance; and finding practical ways to make the role manageable for future prospective Chairs. Organisational culture and

size were said to be important factors in how the role could change. In particular, participants were interested in Co-Chairing, having a Vice Chair and bringing lived experience into the board (the latter is discussed further below) while recognising that having a single Chair could also be the right structure for a charity and meet the main drivers.

Co-Chairing could assist with sharing power and responsibilities or both, depending on why and how co-Chairing had come about (see Table 2).

Vice Chairs were seen as being lined up to become Chair (although there were several stories of this not working out as planned) and having responsibilities delegated to them in a more hierarchical way.

Using committees and subcommittees in intentional ways as a means of sharing power across the trustee board.

Elevating the status of charity Chair in local communities so that it sits alongside local public or civic duties. Other roles like patron or president could be used where the charity wanted to engage a high profile figurehead.

Few participants in this research had experience or insights to share about unitary boards in the charity sector (a single board made up of both executive and non-executive directors) or about how charity governance might adapt to enable social movements¹⁵. Nonetheless, there may be value in exploring the potential and relevance of both in the context of the future Chair.

¹⁴ Certified B Corporations, or B Corps, are for profit companies that have been verified by B Lab to meet a set of standards around social and environmental performance, transparency, and accountability.

¹⁵ This wider global issue is discussed for example by the UN in this article: www.ohchr.org/en/press-releases/2022/10/governments-must-embrace-and-enable-social-movements-key-partners-building [Last accessed on 28.03.24]

Table 2: What participants said about the idea of co-Chair as a way to structure the role

Opportunities

- It gives you a sounding board, a way to bounce ideas around and can make your thinking more creative.
- It means there is a contingency in place should one of the co-Chairs be unwell or absent. A disability charity said this helps practically with being led by a person with a disability whose health and availability may be unpredictable.
- It can be used in succession planning where the co-Chairs likened themselves to a tag team, the longer serving Chair bringing on and eventually handing over to their co-Chair. And so on.
- Having a co-Chair can help make the charity's governance more inclusive and representative of people with lived experience.
- It can be a positive opportunity for CEOs where the Co-Chairs bring complementary expertise and experience.

Challenges

- While it reduces the amount of work, it does not halve the work and can take time to bed in.
- It may be a good option for some charities but it still feels quite new, so charities will need training on how to make it work and may benefit from sharing examples of where it has been tried out.
- It does not always work out. Sometimes, there is one co-Chair that is active and the other one that is quite disconnected.
- While it can be a good way to make the charity's governance more inclusive, sharing the role (and power) is long-term work and not a quick fix. One charity said it had taken them two years to get their now successful co-Chairing arrangement operating smoothly.
- It can be challenging for CEOs especially if the boundaries are unclear or there is poor communication or lack of agreement between the co-Chairs.



Key elements of the role

While people talked about a repositioning of the role, the key elements have not changed much over time even though some things have become more important or the emphasis has changed. This section highlights the elements of the role that participants felt were critical to its future. This research does not seek to duplicate the kinds of role descriptions that can be found in guidance¹⁶ elsewhere. While this research has focused on the role of the Chair, we acknowledge that elements of the role as described below are shared with the wider trustee board.

Oversight and stewardship of the charity's purpose and decision-making

to ensure the board thinks strategically and ahead: "The top thing is clarity of purpose but also not sticking to the knitting when everything around you is changing".

Appointing, managing and retaining the CEO is a key role for the Chair and taken very seriously: "The decision about who to appoint as CEO is overwhelming". This is linked to the critical importance of **building a relationship with the CEO that is based on mutual trust and respect**¹⁷ and where the Chair provides a balance of support and challenge. The relationship is important in charities of all sizes. In small charities where the boundaries between board and staff can be less distinct, any tensions or challenges in this relationship can be particularly demanding.¹⁸

Creating space to reflect and look ahead with both the CEO and trustees to provide leadership that is forward thinking and strategic. In smaller charities, the Chair may be a more significant source of advice and support for trustees.¹⁹

Ensuring the charity's foundations are fit for purpose and fit for the future. This included thinking about charity continuity and succession planning. Preparing the way for the next Chair included considering different leadership models and alternative ways of structuring the role. "My job is to make the job attractive so the next person will take it on".

A facilitator/enabler leading inclusively and building an engaged team. This included being a facilitator of collective decisions and finding ways to value board members. In doing so, Chairs enhance the quality of trustees' experience and the chances of them continuing their involvement, including possibly becoming a Chair in the future.

Sharing power in decision-making is about involving relevant stakeholders in decisions. It will strengthen decision-making. A good understanding of what each board member needs to engage, whether it's extra thinking time, removing excess complexity from board papers, pre-calls etc.

Being mindful of the charity's reputation and maintaining public trust and confidence in a climate of increased scrutiny on social media; a challenging political landscape; and heightened expectations around accountability: "Things are more interlinked because of tech so you can't operate in your bubble. Interacting with your beneficiaries is more complex".

Being more outward facing and open to working across sectors in a time when sectors and service delivery have become increasingly hybrid, is linked to **managing and building relationships. Being open to different models for collaborating** within and beyond the charity – federated models and structures that combine a strong core team with delegated local powers.

Participants also highlighted the role of Chair as **employer with a duty of care** to staff, trustees and volunteers; and with responsibilities for **compliance, not only with charity and company regulation**, but a myriad other regulations governing their work.



¹⁶ For example, the Association of Chairs' *Writing a role description for a Chair*, 2014 [last accessed on 16.02.24]

¹⁷ Cornforth and Macmillan describe how virtuous and vicious circles can occur if trust builds or is broken down in *Evolution in Board Chair-CEO Relationships: A Negotiated Order Perspective* – C. Cornforth & R. Macmillan, 2016

¹⁸ *Board Chair-CEO Relationships: A Negotiated Order Perspective* – C. Cornforth & R. Macmillan, 2016

¹⁹ *Taken on trust: the awareness and effectiveness of charity trustees in England and Wales* – The Charity Commission, CASS & Worshipful Company of Management Consultants, 2017

3.2 WHAT SKILLS AND EXPERIENCE WILL CHAIRS NEED IN THE FUTURE?

Participants were asked what skills and attributes they thought future Chairs will need. They felt that skills for effective Chairs were likely to remain broadly the same, although some may become more important. Below are the skills that they emphasised. As with the discussion about the role in 3.1 above, this is not intended as a comprehensive skills checklist but a synthesis of the findings from this research.

Views differed about whether prior experience of the charity sector is needed

Mainly, participants felt that Chairs needed to have some governance experience before taking on the role of Chair. While some felt such experience should come from specifically charity governance, others valued the perspectives that Chairs could bring from holding governance roles in other sectors, for example the NHS, universities, schools and colleges, or corporates. What mattered equally, however, was that an incoming Chair was willing to learn and take the time to understand the charity and the charity sector. This is discussed further under 'Attributes and behaviours' in the next section 3.3.

Selecting Chairs for their skills and experience may not be possible

Participants shared instances of Chairs taking up the role in an unplanned way, because no one else would or due to a crisis or where succession plans did not work out. In these situations, the list of skills and experience below was not relevant to recruitment which highlights the importance of creating a pipeline of Chairs.

Many of the skills required by Chairs are likely to remain the same

Chairs needed to pay close attention to the legal, financial, employment and digital skills on the board as a whole, especially small and medium-sized charities that generally do not have executive roles covering these areas. Figure 1 (on the next page) sets out a summary of the skills participants discussed with the researchers.

“There is an interesting question, isn't there, about when you take on the role of Chair, should it be something that you're more than fully equipped to do, or should it be something that's a stretch?”



Figure 1: Leadership skills and knowledge of the future Chair

| | | | |
|--|--|--|--|
| <p>Business and management skills around problem solving, good process and time management, staying focused</p> | <p>Good understanding of what it means to be an employer including HR and the duty of care to staff, volunteers and trustees</p> | <p>Skills in foresight, and how to think about the future</p> | <p>Change and crisis management skills and some experience around managing risk, uncertainty and reputational threat</p> |
| <p>Good knowledge and understanding of governance, business models/ finance/funding and charity regulation compliance</p> | <p>Working (rather than expert) knowledge on a range of topics such as volunteering, safeguarding and social and environmental impact</p> | <p>Good knowledge and understanding of the charity sector and relevant subsectors</p> | <p>Working knowledge and understanding of digital technology (including AI) and its relevance to the charity's future</p> |
| <p>Ability to develop and manage relationships with patrons; partners; trustees, staff and the CEO; volunteers and people with lived experience</p> | <p>Ability to influence internally and externally in order to pursue the charity's mission and purpose</p> | <p>Ability to work with people from different backgrounds, outlooks and experience than the ones they are used to</p> | <p>Relationship management skills that get the best out of all the skills and experience around the board table</p> |

Figure 2: Leadership attributes and behaviours of the future Chair

| | | | |
|---|--|---|---|
| <p>Shows genuine interest and commitment to the charity cause</p> | <p>Shows integrity through living the values of the charity in the way they lead</p> | <p>Is confident, resilient, determined</p> | <p>Is a strategic thinker and future oriented</p> |
| <p>Inspires trust in others within and beyond the charity</p> | <p>Listens and learns from others within and beyond the charity</p> | <p>Supports trustees to come to firm collective decisions</p> | <p>Is emotionally intelligent, listens, has empathy and can manage relationships with diplomacy</p> |
| <p>Shows cultural understanding and willingness to explore ways of sharing power in decision-making</p> | <p>Leads with authenticity, showing vulnerability</p> | | |

3.3 WHAT ATTRIBUTES AND BEHAVIOURS WILL BE REQUIRED OF FUTURE CHAIRS?

Participants identified a broad range of attributes and behaviours that will be required in the future and these are summarised in Figure 2 (see previous page). This section discusses participants' views about meeting these attributes.

Four key leadership attributes needed by the future charity Chair

The research has identified four attributes that stood out as particularly important to the leadership style of the future Chair and to the charity's effectiveness. Each of these attributes is discussed below with quotations from Chairs that took part.

Attribute 1: Shows genuine commitment to the charity cause

Participants did not rank the attributes and behaviours that they discussed with the researchers, but they consistently highlighted that the Chair needed to demonstrate steadfast commitment to the charity's cause, purpose and people. This was evidenced, they said, by the Chair's willingness to spend time and effort understanding the charity's mission and purpose. This commitment and understanding helped the Chair keep themselves and those around them – trustees, staff, volunteers, partners – focused on the charity's purpose. Participants felt that to be critical to decision-making and strategic thinking.

“Main thing is to be focused on the social purpose, and the strategy can be driven by that. If you lose that focus then it will trip you up.”

“The top thing is clarity of purpose but also not sticking to the knitting when everything around you is changing.”

Attribute 2: Is a strategic thinker and future oriented

In Part 1 of the report, the researchers discussed how the challenges being experienced in the charity sector had left some boards and staff teams, especially of small and medium-sized charities, focused on the near future and unable to look ahead. Consequently, some Chairs found themselves alone in thinking ahead and struggled to engage the rest of the board in this. They saw being future oriented as being outward-looking, inquisitive, and open to innovation and risk-taking. They also felt a responsibility to:

“... bring trustees and CEOs into spaces where they can generate new thinking, where they can generate, where they can postulate.”



“I think there’s something about giving of yourself and sharing of yourself so people can relate to you.”



“Their emotional intelligence and cultural understanding is going to have to be really really good. And when I say cultural understanding, I think it’s not just in terms of people from different backgrounds and communities, it’s also working across sectors and understanding how to get the best out of people that have come from different professional backgrounds as well.”

Attribute 3: Shows cultural understanding and willingness to explore ways of sharing power in decision-making

Participants who raised this in the research showed great enthusiasm for trying out new ways of working and, as Chairs, said they tried to model a willingness to adapt. They took an interest in the learning styles of different trustees and what they needed to fully engage with the board. Taken together, such changes meant looking at not only structures and processes but also behaviours. Behaviour changes could lead to significant improvements in governance but were harder to implement requiring deep and honest conversations.²⁰ The practical examples that participants gave included:

- Experimenting with holding meetings at different times, locations and durations
- Building in thinking time during meetings in order to hear from people who take longer to reflect
- Removing excess complexity in papers and holding pre-calls to encourage participation
- Actively looking for ways to demonstrate that all trustees are valued and included.

Attribute 4: Leads with authenticity, showing vulnerability

A minority of participants discussed this in depth. Mainly they were working in charities that were also seeking to shift power in favour of people with lived experience. They wanted Chairs to be willing to be open and vulnerable and thought that made them more relatable as people, which would enable them to have honest conversations with trustees and partners.

“I think a really good Chair will be willing to be vulnerable in some ways ... I think if you appear to be absolutely all things to all people and incredibly efficient and whatever, you’ll probably run an efficient charity but it won’t necessarily be effective.”

What matters is that attributes translate into behaviours

While participants listed a great many ideal attributes, they recognised that one person could not possess them all: *“It seems unimaginable that one person could embody”* all these attributes. Further, they said that charities needed different attributes in their Chair at different points in their organisation’s journey and development. What mattered was that attributes were translated into positive behaviours. Put another way, they wanted to see Chairs that live the values of the charity they lead.

“Chairs need to think about how their values are expressed and lived in the organisation because some of these values will be about how we collaborate and share power.”

²⁰ Hudson, M. and Ashworth, J. (2012) *Delivering effective governance: insights from the boards of larger charities*. Bucks: Compass Partnership



KEY MESSAGES

Pipeline of Chairs

- Understanding motivations of potential Chairs, particularly younger generations, is crucial for recruitment and creating a pipeline of future Chairs.
- Barriers to engagement such as time pressures, level of responsibility (particularly concerns about liability) and lack of diversity on boards also need to be understood and addressed.
- Recognition and reward beyond remuneration are important factors in encouraging people to become a Chair.
- The ways forward identified are: prioritising equity, diversity and inclusion; promoting the role of Chair as aspirational and fulfilling and being clear about expectations; and preparing succession planning at an early stage.

Support needs for Chairs

- Participants talked about a range of support and development needs, from board and practical skills to leadership and governance knowledge. They showed an appetite for more equity, diversity, and inclusion training.
- Adaptable and tailored support mechanisms such as networking opportunities, peer learning, coaching, and mentoring that are better suited to often time-poor Chairs are especially valued.
- Priority areas for the future are: a continued focus on practical skills training, with additional emphasis on digital skills; developing leadership skills and offering leadership development programmes that align with future trends (including foresight and collaboration); and building resilience among Chairs to navigate challenges in a fast-moving and sometimes unfavourable landscape.

Part 4: How will charity Chairs be recruited and supported?

This section focuses on two important areas for future Chairs and indeed for the continued sustainability and impact of the charity sector – how a pipeline of future Chairs can be created and nurtured, and the types of support Chairs could benefit from.

4.1 CREATING A PIPELINE OF FUTURE CHAIRS

As seen in 2.1, recruitment was a challenge for charities including the recruitment of trustees and Chairs. This is not a new challenge²¹ but there was a real concern among participants that it would become increasingly difficult in the future. This section brings together some of the suggestions they made to help remedy this issue.

Engaging with people's motivations

Participants thought that creating a pipeline of future Chairs required having a good understanding of the many reasons why people would want to get involved. Some felt that it was particularly important to understand what younger generations valued because they were the ones who would be the Chairs of the future. They highlighted generational differences

in terms of people's expectations with regards to work-life balance, accountability, organisational integrity, and diversity which they could see already influencing patterns of involvement and wondered how that might evolve in the future. It was highlighted also that younger people were more likely to see becoming a Chair as a way of developing their career. However, the lack of time and availability was perceived to be more of an issue for them.

Understanding the barriers to engagement

Creating a pipeline of future Chairs was also seen as being dependent on having a good understanding of what might stop people from putting themselves forward for the role. There were several key barriers that participants referred to which sat broadly under three categories – time commitment; level of responsibility; and diversity, equity and inclusion. Issues relating to level of responsibility were often linked to time commitment. There was a perception that to fulfil the role of Chair properly and meet the responsibilities and expectations associated with the role, people needed to have time as well as skills. This was seen as one of the reasons behind the lack of diversity among Chairs and trustees, with those more likely to come forward at the end of their career or once retired. This contributed to others feeling that the role wasn't for people like them.

“... some people might welcome more public recognition, some people may welcome more CPD, more opportunities to develop their skills. I don't know. There's a big conversation to have there.”

²¹ [The looming crisis in charity trustee recruitment](#) – Getting on Board, 2017 [Last accessed on 18.03.24]

Table 3: Barriers to engagement with becoming a charity Chair

BARRIERS TO ENGAGEMENT

Time commitment

- Too much time needed to fulfil the role properly
- Incompatible with other professional and personal obligations and commitments
- Risk of burnout

Level of responsibility

- Concerns about liability
- Complexities and lack of accessibility of regulatory framework
- High expectations associated with the role
- Risk of stress

Equity, diversity and inclusion

- Lack of diversity among current Chairs and trustees
- Lack of confidence and people feeling that they don't have the right qualifications, skills and/or experience
- Not feeling valued or welcome, or a sense of not belonging

Thinking about recognition and reward

Linked to the question of motivation and barriers was the issue of recognition and reward and how it might encourage people to put themselves forward and maintain their involvement over time. The financial remuneration of trustees and Chairs has long been the subject of debates.²² Unsurprisingly, there wasn't a consensus among participants. While some considered that the remuneration of Chairs could lead to more inclusive boards and improve accountability, others felt it wasn't a guarantee of good governance and/or that it might lead to people getting involved with less commitment to the cause of the organisation. At a practical level, it was seen as impossible for small and medium-sized charities to implement because of the additional costs involved. Even though participants had mixed views on this topic, there was a shared acknowledgment that recognising and rewarding Chairs for their contribution would be important to increase the pipeline of future Chairs and deserved more attention. It was about exploring different options and considering recognition and reward in broader terms than remuneration, including how the role of Chair could lead to greater voice, influence and credibility.



²² [Should charity trustees be paid?](#) – NPC, 2012 [Last accessed 26.04.24]; [Third Sector Podcast: Should trustees be paid?](#) – Third Sector, 2021 [Last accessed 26.04.24]

Ways forward

The issues raised in this section reinforce the need to reposition the role of the Chair (as seen in Part 3) so that it is more manageable and attractive to a wider range of people. Participants talked about different areas of action that could contribute to this, namely:

- **Equity, diversity and inclusion** – by prioritising equity, diversity and inclusion within organisations, including in terms of governance, ensuring that it is embedded within the culture of the organisation and that equal attention is given to all three.
- **Recruitment** – by promoting the role of Chair as aspirational and fulfilling, making adverts less overwhelming and more appealing, and being open about what the role entails and how people can expect to be supported.
- **Succession planning** – by preparing for it long in advance, actively seeking out potential candidates and nurturing them, and creating development pathways for trustees to become Chairs.
- **Accessibility of information** – by ensuring information (including regulatory guidelines) on the role and responsibilities of Chairs and trustees is communicated in a way that is engaging and accessible.

“There’s so much that we could all do as a sector to celebrate what the role is all about.”

Support organisations were seen as having a key role to play in shaping a new and refreshed narrative about the role of the Chair, celebrating inspiring Chairs as charity leaders, encouraging the uptake of employer-supported volunteering and advocating for alternative models of governance that can help remove barriers.

“There’s a real joy in doing these things. And we always focus on the bad stuff, the responsibilities, the financials, but the actual impact of what charities do, you know, the way you can get insight into that if you are involved as a trustee or a Chair is special.”

4.2 WHAT KIND OF SUPPORT WILL CHAIRS NEED?

In view of the increasing pressures facing Chairs and the many facets of the role, the Chairs in the study identified a variety of support and development needs that they felt were particularly important.

Support and development needs identified by Chairs

Support and development needs ranged from very practical board skills (such as chairing meetings effectively) to knowledge of governance and the charity sector, and leadership development. There was an appetite to do more in terms of equity, diversity and inclusion especially around learning how to lead inclusively, highlighting that work in this area at an organisational level often failed to engage trustees or was quite superficial with the emphasis often more on diversity than equity and inclusion. Although Chairs mentioned needing to make space to be more forward thinking and thinking about the future strategically, they did not specifically refer to improving knowledge around foresight skills or tools. With a few exceptions, they were also less prone to talk about digital skills or digital literacy in terms of development needs.

Providing and adapting support to Chairs

Participants talked about development needs but also about the types of support they accessed and what worked best for them.

Only a few Chairs referred to support from within the organisation they chaired, beyond the support they received from fellow trustees

Those who did were Chairs of larger charities with staff providing support in specialist areas as well as administratively. In small and medium-sized charities, the situation was often reversed with the Chair providing support in operational areas (see Part 3).

Chairs were more likely to talk about external formal training opportunities

Some were unsure how to access opportunities or find credible providers. Others valued opportunities that were specifically aimed at Chairs rather than trustees as a whole. They identified some good practice in terms of the training available but believed support organisations, could provide more progression and development pathways for Chairs and trustees to continue their learning. Having these pathways would encourage people to build on newly acquired

skills and contribute to personal and professional growth. It was seen as a way of creating a pool of trustees who could potentially become Chairs in the future, nurturing existing Chairs and addressing potential skills gaps to improve organisational resilience.

Chairs wanted more opportunities to network

They talked about the value of sharing ideas, challenges and experiences, learning from other Chairs and trustees, and generating new thinking together, including new thinking about the future. They were also in favour of having more opportunities that would bring together Chairs and CEOs, positioning them both as charity leaders. They saw this building of community as particularly beneficial at a local or subsectoral level.

Peer learning, coaching and mentoring could be better adapted to the needs of Chairs

Some participants highlighted how difficult it was for them to find the time to attend training courses or networking events, and how challenging that made it to acquire additional knowledge and insights or address any skills gaps they might have. Peer learning, mentoring and coaching were popular support options because they could be tailored to fit with people's learning styles and circumstances. This seemed even more important in a context aiming to open up boards and for more diversity among Chairs.

“[Support organisations] are not able to offer progression in the way that I think many [charities] probably need [...] They probably can't keep all their members at any one time because they've done all these courses and then they'll not pay next year because they've done them already.”



“Time is an issue – taking a day to do something with other Chairs is not viable. But doing something where you are getting together with other Chairs around key issues and those other Chairs represent diversity of thought around that. That would be useful.”

Ways forward

Based on what participants said, the research identified a number of key priorities to help Chairs lead in years ahead and enhance the future sustainability and impact of charities and the charity sector.

Board skills

Training is already available on governance, finance and HR but people are not always aware of the development opportunities available. These opportunities need to continue and take up be encouraged. In addition, more needs to be done around digital skills where a gap has been identified. Progression paths should also be available so that Chairs can continue to grow and feel ongoing support.

Leadership development

What is needed are both opportunities to develop leadership skills commensurate with future trends (including scenario planning or other future foresight techniques) and opportunities that encourage collaboration, openness, inclusive practices and a less isolationist/heroic style of leadership. Rather than one-off training courses, support organisations need to offer a development programme of different interventions especially aimed at Chairs.

Resilience

The provision of support will need to help Chairs become more resilient and develop their ability to operate in an often unfavourable and challenging policy and regulatory environment. This will involve:

- Reading and handling the political, regulatory and media landscape to stay brave and on track with the charity’s mission, including advocacy and campaigns as well as service delivery.
- Analysing and managing partnerships and collaborations both within and outside the charity and across sectors in order to achieve positive outcomes through working together.
- Building solidarity and confidence among Chairs to ensure a generation of bold future leaders that are able to navigate the challenges and opportunities of the future and contribute to sector-wide sustainability and impact.
- Culture of support – a culture of support needs to be cultivated within organisations to help Chairs in their role and strengthened by support organisations working more closely together and with the Charity Commission.

Part 5: Conclusion

This report has set out findings from in-depth research with Chairs and the organisations that support them, to shed light on what the future looks like and how Chairs can be better prepared for both its opportunities and its challenges. The report has looked at how Chairs see the future, what the role of Chair will look like and what support will be needed in the future.

This final part of the report discusses the research conclusions under four main headings that bring together the key themes and issues from the research. They are:

- The role of Chair is a leadership role
- The role of Chair is a role to aspire to
- The pipeline of future Chairs is a real concern
- Support for Chairs needs to be future-focused.

5.1 THE ROLE OF CHAIR IS A LEADERSHIP ROLE

The research looked at how Chairs see their role and what might need to change for them to deliver it effectively in the future. It found that Chairs and others in the sector considered there needed to be greater understanding of the fact that Chairs play a leadership role in their charity and the charity sector.

One way to equip Chairs as future charity leaders is to make them aware of the different leadership models that exist and understand how they can be utilised. Different leadership models may be suitable depending on organisation and circumstances; the same Chair may use multiple models to enable a flexible and adaptive approach to leadership. In Part 3 we discussed a range of leadership models. Three of those models particularly resonated with the importance that Chairs attached to relationships and collaboration, as well as equity, diversity and inclusion in charity leadership. Support from charity infrastructure to strengthen and develop these different types of leadership would help address the issues facing charities in the future.

- **Inclusive leadership:** the Chair leads inclusively, values the skills and experience fellow trustees bring to the board and seeks to support their development needs and growth. This has links with ideas around servant leadership.
- **Shared leadership:** the Chair shares power by supporting trustees to work with one another and take on responsibilities. This has links with ideas around distributed leadership, collective and collaborative leadership.
- **Ecosystem leadership:** the Chair recognises the need for an ecosystem response to major and complex challenges and understands that they can play a leadership role in that ecosystem response alongside others.

In order to make the role of Chair work and enable these models of leadership to be understood and adopted, attention must be given to the way the role is presented, the pipeline of future Chairs and the kind of support that is required.



5.2 THE ROLE OF CHAIR IS A ROLE TO ASPIRE TO

The research looked at what might motivate people to become the Chairs of the future. It found that there was scope to present the role as aspirational; an opportunity to develop personally and professionally as well as helping contribute to social change.

Good work is being done to make charity governance more inclusive and accessible. The research benefited from the insights and experience of programmes and networks working to achieve change in charity governance; Action for Trustee Racial Diversity (ATRD), the OnBoard Programme and the Young Trustees Movement to name three of them. The report discusses different ways to reposition the role of Chair, by restructuring it; aligning with social purpose discourse; making the role aspirational; and reframing power and leadership in this context.

On the latter point, while Chairs will always be first and foremost leaders in their own charities' governance, the findings also suggest a need to be much clearer that the role of Chair is a sector leadership role. As such Chairs need to feel and be a part of the sector whether that is the local ecosystem of organisations where they are based, or a network of charities connected by mission and purpose. Making governance more accessible and inclusive will help Chairs feel they are part of a wider ecosystem, and better placed to tackle some of the current and future issues in society that are often complex and interconnected. The equity

movements named are progressing this task of repositioning the role, other support organisations are already listening and learning from this. To make a difference to sector governance – from the small charities to the very large ones – these efforts will need to become even more joined up, engaging support organisations, the Charity Commission and other regulators.

5.3 THE PIPELINE OF FUTURE CHAIRS IS A REAL CONCERN

The research looked at the recruitment of Chairs and trustees. It found that charities are already experiencing difficulties with recruitment and expect that it will become even more of a challenge in the years to come.

The role of Chair is a demanding multi-faceted role but one that can be richly rewarding and accessible if it is positioned carefully so that a wider or different profile of people come forward. The sector could look for people with suitable skills, attributes and governance experience, (which may be from another sector) and motivated by the opportunity to achieve social change in the charity sector. As with all volunteer roles, understanding motivations is key to getting people on board and sustaining involvement. The same is true of feeling supported and recognised. There is plenty to draw upon in the volunteering literature and good practice²³ which is rarely used in relation to Chairs. However, more needs to be done on understanding the specific types of support and recognition that could contribute to making the role of Chair more manageable and appealing to a wider range of people. There is a need to consider reward and recognition in broader terms than just remuneration.

Failure to pay attention to the future pipeline of Chairs could lead to fewer people coming forward and/or increase the number of ill-suited candidates. Given the considerable number of

charities and the resulting demand for Chairs, this would have significant consequences for both the sustainability and the impact of charities and the charity sector. To achieve a healthy flow of Chairs in the future, the sector will need to look harder at who those Chairs could be and where to find them; the kinds of pathways into the role that would work for them; and the different ways of supporting them.

5.4 MORE SUPPORT FOR CHAIRS NEEDS TO BE FUTURE-FOCUSED

The research looked at existing guidance and support for Chairs and what more could be provided. It found that there are already good examples of near-term guidance and training that support organisations and regulators can help develop.

Many Chairs are focusing on the present and the near future and seem ill-prepared for what is coming further down the line. The way the role works currently prevents them from finding enough space to think about the longer term and how they will lead in the future. There is plenty of support available for Chairs to help them strengthen their skills but there are some gaps that need addressing and would benefit from more investment from funders at a sector level. Of particular importance are leadership development and foresight skills to inform strategic decision-making. It is not about being able to predict the future, but having the skills and tools to explore possible future developments and be better prepared.

Critical to explorations of what the future might look like will be an increased understanding of digital transformation. More needs to be done in the area of digital skills which are increasingly becoming an integral part of leadership development in a world that is more and more technology-driven. Plus, engaging with developments in AI may

²³ Rochester, C. et al (2010) *Volunteering and Society in the 21st Century*. London: Palgrave Macmillan

help Chairs and trustees spend less time on process tasks and more on strategic activities. Many of the major challenges that the world is facing such as growing inequality and climate change require leaders (including Chairs) to look beyond their own charity and explore solutions collectively. More support needs to be provided to strengthen Chairs' capacity to be more outward-looking, build relationships and collaborations within a wider ecosystem and champion inclusive practices. This could be achieved through support organisations creating a leadership development programme specifically aimed at Chairs.

RESEARCHERS CLOSING REMARKS

This research has concentrated on listening well to Chairs to understand what they, and future Chairs will need to lead effectively in 2033 and beyond. The findings present challenges for the sector but they also point to exciting ways that the role of Chair can appeal to future leaders and future generations.

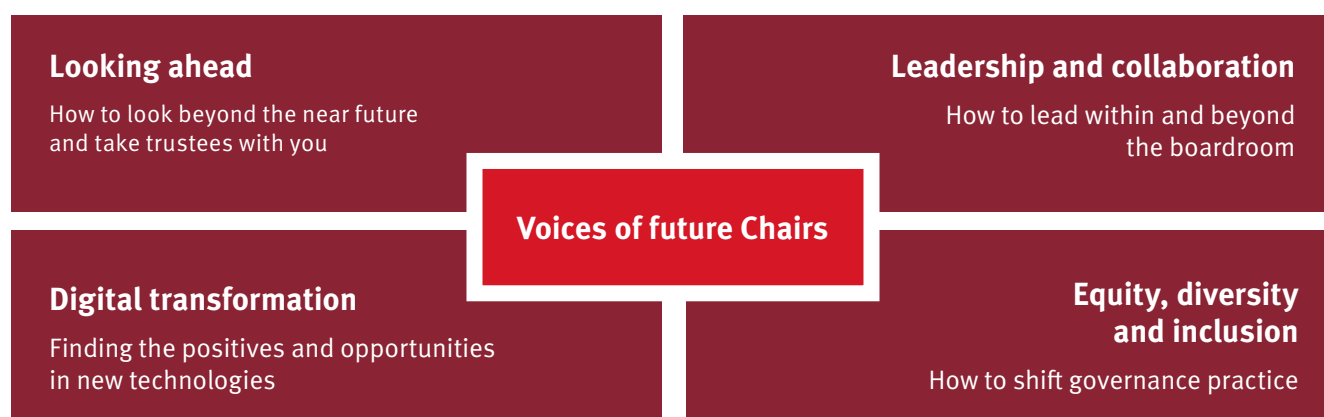
Adequate and varied support for Chairs already exists; more is needed around leadership and practical ways for Chairs to look beyond the near future and bring trustees with them. This research points

to a number of areas of support – see Figure 3 – that could be used as a simple framework for building future leadership support. There are many quality Chairs in the charity sector who are finding innovative and creative ways through the challenges and opportunities that have been discussed in this report. Their insights and experience can help others navigate the future. By continuing to listen to Chairs, support providers can build on their strengths, respond to their needs, and provide guidance to support success.

“Charities simply cannot do their job without trustees and Chairs, therefore the Commission is keen to understand any enablers and barriers to taking on these roles. We are open to how we might further support the sector through our guidance, communications or other interventions – including if we can help to address any impressions of excessive burden regarding these roles.”

Paul Latham,
Director of Communications and Policy, Charity Commission

Figure 3: Key leadership development components based on the research



Steering Group recommendations

Recommendations

THE ROLE OF THE CHAIR AS A LEADERSHIP ROLE

- A leadership development programme for current Chairs. This programme will require modules on areas such as models of leadership, how to fully embed EDI principles and behaviours, the skills, knowledge and behaviours associated with collaborative and collective leadership, foresight methods to inform strategic decision-making and the critical nature of the Chair/CEO relationship.
- Ongoing training is required but needs to be more than a one-off course and should include an extension of existing peer support networks and a menu of online interventions that can be selected as one's personal leadership journey progresses.
- Time effective peer support learning could be at a local and/or subsector level as required. This would provide an opportunity to learn from others how they have innovatively rethought their governance demands using for example, co-chairs, board buddies, shadows boards and board observers.
- There are piecemeal efforts already in place that have proved their worth. Now is the time for these efforts to be more joined up and taken to scale through engaging more support organisations and cross-sector players. Renewed sector effort is required to share existing resources and to improve signposting to that which is already available.

Further research: The report discussed the use of flexible governance models, different forms of board and different styles of leadership. While it is possible that other models such as unitary boards or the more widespread introduction of a senior independent director role could be beneficial, there is not enough known at this time to make any recommendations. The sector could benefit from cross-sector research on this area with recommendations on how this might be applied in the charity sector.

THE ROLE OF CHAIR IS ONE TO ASPIRE TO

- There is a need to promote the Chair's role as one of ambition and aspiration, and to utilise the joined-up efforts of civic bodies, support organisations, educators, recruiters, and the Regulator.
- There are excellent Chairs within the sector and a spotlight on these can help others. For example, Trustees' Week could be an opportunity to celebrate the Chair's role in addition to that of their trustees.
- As a regulator the Charity Commission plays an important role for the sector. Its guidance is key to setting standards of best practice. We recommend that, where appropriate, the Commission reflect the changing nature of the Chair's role in its guidance as that role continues to evolve.

- The Charity Governance Code was last updated in 2020, in this report the rapid pace of change has been discussed. We recommend that the Code Steering Group consider the specific and distinctive role of Chair during its 2024 of the Code.
- Work is required across sectors to ensure that the value of the charity Chair's role is understood, communicated and valued in terms of the personal and professional development opportunities that it offers.

Further research: More research is required on motivations, reward and recognition, each in its broadest sense, and beyond the remuneration debate. Research will need to be positioned in the context of the next generation of Chairs and their potentially different needs.

THE PIPELINE IS OF CONCERN IF NOT ADDRESSED PROGRESSIVELY

- The role of a current Chair and their board needs to be proactive not reactive in addressing the future pipeline, reducing the onus on an individual getting themselves into a ready position to become Chair.
- Current Chairs should encourage a collective and open board mindset to seek out the right talent for their organisation. While many charities will not use recruitment professionals it is important that the same rigour is applied to any recruitment process and that an inclusive and equitable interview process is in place to ensure the required diversity.

- Everyone on the board should seek to expand their networks beyond their own circle, proactively meeting people from other communities, sectors, or organisations. Networks full of loose ties are more effective and more productive than those with strong ties and lots of overlap. Meetings need to be used to identify talent capable of development as well as to understand what, if any, barriers exist to these people joining the board.
- Chairs need to embrace succession planning for their board in general and to work with their trustees to develop and share development opportunities. Too often this is left to a time of urgency. A standing agenda item on the board calendar would help to ensure that succession plans are in place in advance of their need.
- Regular board appraisals can be used to explore the appetite amongst trustees to take on a Chair role and to discuss qualities, skills and any development needs.
- While a development programme aimed at Chairs, with a menu of different interventions may be useful, there are other effective internal leadership pathways that can be embraced. While recognising that not every trustee wants to become a Chair, mentoring, the chairing of subcommittees with rotation of Chairs to give the opportunity to develop chairing skills, and a formal, well-structured deputy Chair role can play a role in strengthening leadership.
- To build familiarity with charity governance consideration could be given to inviting potential members to attend with a defined role of Board Observer.
- There is a sector wide need to research what reward and recognition means in the context of the next generation of Chairs and their potentially different needs.

Further research: More research is needed to understand the specific types of support, reward and recognition that could contribute to making the role of Chair more manageable and appealing to a wide range of people. Research is needed to explore what 'reward' means in its widest sense (beyond financial reward), and for whom, referencing both current and future generations of Chairs.





TIPS FOR RECRUITMENT

- The biggest hurdle for people looking to take on Chair roles is likely to be time commitment. Be realistic on expectations and think about it as a whole board with distributed responsibilities, sharing the leadership load.
- Diversity should flow out of organisational strategy, not become important at the point of recruitment. Understanding your strategic priorities regarding diversity – whether the requirement is to reach a wider audience; to harness new insights; to be more representative and/or equitable; to have more authentic credibility in different communities; to challenge the status quo etc. – is important as this informs the mandate for the hiring process and creates greater candidate buy-in. Be clear in how you anticipate and want diversity to positively affect the board and the organisation and what is in place to support new hires.
- Articulate a clear and candid vision for why people would want to join the organisation.
- Agree on key proxies or parallels which could stand in for any lack of prior main board Chair experience, including evidence of a track record of leading committees or sub-boards; managing complex meetings with diverse stakeholders; a history of balanced and proportionate decision-making or judgement in challenging circumstances; the capacity to convene and harness the wisdom of groups; strategic analysis; rapport-building; and high levels of self-awareness, emotional and cultural intelligence, for example. When looking for fresh perspectives and different experience, avoid deficit thinking, noting what the individual lacks, and use assets-based language of abundance.
- Avoid recruiting for ‘fit’ and focus on ‘complementarity’ and how the new Chair will be ‘additive’ to what already exists. It is common to think about recruitment in terms of the specific gap being left by the individual departing. It is more useful to consider the collective skills, attributes, and experience of the board, how these might be redistributed, and how day-to-day governance could be reshaped to allow for different types of appointment to be made.

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Appendix A: Resources

A selection of useful resources for Chairs and those considering becoming a Chair in the future:

Good practice and guidance

Action for Trustee Racial Diversity and Getting on Board (2021) *From Here to Diversity: A practical guide to recruiting Black and Asian charity trustees* [Last accessed 26.04.24]

Association of Chairs (2014) *A Chair's Compass: A guide for Chairs of charities and non-profit organisations*. London: AoC

Association of Chairs (2015) *A question of balance: a guide to the Chair and Chief Executive relationship*. London: AoC

Bayes Centre for Charity Effectiveness (CCE) (2021), *Lived Experience on nonprofit boards*

Getting on Board (2022) *How to diversify your charity's board: a practical guide*. London: Getting on Board

Futures publications

Civil Society Futures (2018) *Civil Society Futures: Research Report*

Good Innovation (2023) *The Future of Charity*, *Good Futures Paradigm Shift No. 7* [Last accessed on 26.04.24]

NCVO (2024) *The Road Ahead 2024* [Last accessed 26.04.24]

NPC (2024) *State of the Sector 2024: Ready for a reset* [Last accessed 26.04.24]

TPXImpact, Massive and Kivo Transformation (2022) *The future charity: how to drive change and innovation across the sector* [Last accessed 26.04.24]

Appendix B: Research approach and methods

A qualitative research approach was chosen to capture the perspectives and voices of Chairs and produce rich data and insights into underlying motivations, behaviours, and attitudes.

The research focused on registered charities in England and Wales that had at least one paid employee and used purposive sampling and snowballing to identify Chairs in charities of different sizes delivering diverse activities. The researchers worked with equity programmes and networks to ensure that young Chairs and Chairs from minoritised groups were included.

The research was guided by the following questions:

- What attributes and skills will Chairs need in the future in order to provide leadership, oversight and stewardship of their organisations?
- What attributes and skills will Chairs need in the future in order to help strengthen the sustainability and impact of the charity sector in general?
- How will organisations in the future attract Chairs that are suited to deal with the challenges and opportunities of the future?
- How can a recruitment pipeline of future Chairs be created and nurtured?
- How can current good or innovative practice inform governance and the role of the Chair going forward?

The research was carried out in three phases between July 2023 and February 2024. It involved a total of 61 Chairs and 23 representatives from organisations and programmes that support charities and charity governance. The emerging findings from the Chair interviews were shared during a series of facilitated group discussions to check for resonance and validity and to consider their implications.

A Steering Group supported the project throughout, in particular for the identification of relevant sources of literature, recruitment of participants and sense-checking of emerging findings.

Phase 1 Scoping

- An overview of the literature (51 sources were selected) covering good practice, the charity sector context, and the future of charity and civil society.
- Seven scoping interviews (including with four Chairs).
- A futures workshop with the Steering Group and project stakeholders (facilitated by Good Innovation).

Phase 2 Interviews with Chairs

- In-depth semi-structured interviews with 25 Chairs from charities of varying sizes and activities. The sample included
 - the Chairs of six major/super-major charities, five of large charities and 14 of small and medium charities.²⁴ Among the small and medium charities,

five charities had an income under £150k.

- the Chairs of charities carrying out different activities including service delivery, trusts and foundations, membership bodies, and international organisations (based in England or Wales) across a number of subsectors including health, disability, children and young people, refugees and arts/culture.

Phase 3 Group discussions to sense check and build on the interview findings

- Five group discussions with 32 Chairs (including three who had taken part in phase 2) with two sessions co-hosted with equity partners.
- Two group discussions with representatives from support organisations and programs (including four who were themselves Chairs) with one session co-hosted with NCVO.

²⁴ The research took account of the NCVO UK Civil Society Almanac definition of small charities: £10K-£100K income; medium: £100k-£1m; large: £1m-£10m; major & super-major: over £10m. Chairs of charities with an income under £100k were approached but their capacity prevented them from taking part.






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