



Students' Union Trustee Board Research 2019

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Introduction

In the dim and distant past (pre-Facebook in fact) I was elected as a part time officer with a mandate to support Raise and Give (RAG) volunteers. It came as somewhat of a shock a few days after my election when I found out I was also a Trustee with responsibility for a nightclub, a nursery and advice services.

At this point, Trustee duties were associated solely with student officers and mixed among campaigning in single meetings. There were no lay members to help guide the officers.

My Union was one of the first to develop the model now widespread across SUs with officer, lay and student members and a focused meeting schedule. After my elected time I worked at the National Union of Students, developing the initial guidance notes for Charity Registration, Incorporation and the Model Governing Documents that are now used across the UK.

Despite time on the University side of the HE partnership and work with organisations such as Wonkhe and the OIAHE, my thoughts have never strayed far from students' union Trustee Boards. I work with 5 London based Unions providing Company Secretarial support and governance advice.

Late in 2018, I noticed that a large number of unions were asking questions on the NUS Workplace website about boards – who sat on them, what was the point of student members and who was the chair. It seemed to me that there was a need for a coordinated piece of research into this. This report of 123 students' union Trustee Boards is the fruit of that thought.

I hope that this resource is useful for Unions thinking about their Trustee Boards and that the questions posed spark debate in your governance working groups.

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Officer Trustees

Officer Trustees	1	2	3	4	5	6	7	8	10
Unions	0	8	21	31	31	23	4	3	1

The only thing that Students' Unions do that no one else can is represent students. Other organisations can provide leadership opportunities; sports centres and local halls provide activities; and our high streets and campuses are all too willing to sell learners a coffee, a halloumi wrap or even a beer. Representation has been our main purpose since the first Scottish Ancients, and it is hard to imagine it will ever be otherwise. In that context it is no surprise at all that every single one of the 123 students' unions that were researched had student officers on their boards.

In England and Wales, the Charity Commission recommends that no more than half of the trustee board should be financial beneficiaries of the organisation. In almost all cases the number of officer trustees is fewer than the combined numbers of other trustees. Those unions with more than half the trustees being paid officers have particularly large officer teams.

One Union has 10 officers (one of which is a sabbatical) on its Trustee Board and no lay or non-representative student members. I've removed this outlier from the rest of my data as it is clearly very unusual. Some unions have part-time officers with trustee responsibilities, and these are also classed in this section for the research.

What? I'm now a trustee?

The trustee element of being an officer can come as a surprise. It's good practice to include trustee declaration forms in candidate packs, not least because it allows you to spot anyone who is not eligible to be a trustee early on.

Much work has been done over the years discussing "hats", and when an officer is wearing one or more. If an officer is finding it difficult to decide which hat they are wearing when looking at a paper it can be useful to invite them to write down all elements of it or decisions they want to make based on their representative roles to help refine how they approach that item. This list can then be put aside allowing them to think more clearly as a trustee.

In my induction for Trustees I talk about coincidences of interest alongside conflicts. Better course representative investment advances the unions core purpose - if it also helps a campaign pledge, this is a complimentary goal not a conflicting one. The board should be ready to consider and discuss the differences.

Officer burnout and difficulty trying to juggle priorities is common. Forward scheduling of meetings and blocks of time for them to read their papers is a good way to help alleviate this. Equally important for this to succeed are timely and clear papers from senior management to the Board.

Accountability is a pressure for student officers – and I think rightly so. One of the difficulties in the Trustee context, however, is the realisation that here is a responsibility *shared*. Officers might have the final say on safer lighting but they have no more, or less, say than a student trustee on issues at the board. Some officers embrace this – leadership can be lonely and sharing it at least sometimes is a relief. Others move away from the idea of the Board as a shared endeavour and start suggesting tactics or "lines" which divide the officers from the other Board members. Sometimes this is because of concern that an officer might

appear to lack understanding on an issue (mainly when they do). However, challenging this behaviour so that weaknesses are shared and dealt with rather than ignored and left to go unchanged is vital to a high functioning board.

3 things to try

- Make sure candidates for officer roles have clear guidance on the trustee element and sign declaration forms before the election.
- Check what their employment goals are and align subcommittee membership. The fashion student starting their own business might find audit more useful than HR.
- Train officers on culture and honesty about weaknesses inside the Board.

Student Members

91.8% of all Unions have non-officer student members on their board. On average, each Union has 3.2 student members (compared to 4.5 Officer Trustees). One Union has up to 19 student trustees (3 officers, 2 lay members) but has been removed from the averages.

Student members	0	1	2	3	4	5	6	8	19
Unions	10	6	20	28	38	8	7	1	1

Fair to say that when students' unions adopted Trustee Boards as we now recognise them, it was lay members who were the most alien category of membership. In that context, relatively little work was done 10 years ago to help unions integrate student members so its no surprise that student trustees seem to be an area of concern for many unions.

Unions rightly put in a huge amount of time for inducting and developing their sabbatical officers in all areas of their responsibilities including trusteeship. Where possible, this same training and support should be offered to students. This might mean scheduling trustee induction training early in the summer before students have left or being prepared to support student board members with costs to travel back before the new academic year begins.

The added value of student trustees

One of the key concerns I see on boards is the sense that student members are "different". I think a lot about their first experiences of being a trustee. If they turn up to a meeting with officers who seem confident and informed about trusteeship, and lay members with years of experience and expertise, it's understandable that even the most confident individual may be intimidated. Treating student members as equal to officer members in their training and induction can give them a framework to get involved. In the training I offer, I ask students – not officers – to take a lead on presenting back and discussing the learning so that they start by saying "This is what I know", not thinking "This is what I don't know".

The mix of skills and experience on each trustee board will differ based on the union's strategic and operational priorities, but one thing that boards will always need is critical thinking skills, analysis and a questioning approach. These are the fundamental basics of education and student trustees are living this every day in their academic studies in a way that many of us in full time employment are not.

We should get coffee

I'm yet to undertake a trustee efficiency review where I don't recommend that the board spends more time together outside of the meeting informally. I've seen magic things happen to student trustees when they see lay members as real people with experiences to share. The law firm partner has provided work experience to a 2nd year. The media executive's experience running a literary festival sparks a shared interest. A fundraising consultant can talk about their faith with a student who defines themselves by their belief journey. I'm not sure this sort of thing ever occurs over the Management Accounts and it's the sort of thing that can give student trustees a real sense of place and worth on the board.

We often set board meetings around the lay members' availability, but sometimes they have more flexibility than students do (it's easier to move a work meeting than reschedule a crucial lecture). Several of my boards set the dates of meetings for the following academic year in May but leave the timings for when students have their timetables and work schedules.

Charity board decisions are about 3 things - values, resource allocation and compliance. Student trustees might not be able to share their experience of writing a GDPR Compliance report, or running a commercial service, but more than anyone else they should be able to share thoughts on organisational values and they should be given the space to do so.

3 things to try

- Let student trustees chair subcommittees, aided by the lay members with expertise
- Allocate a student trustee to each agenda item to take ownership of the item and give feedback on accessibility for students,
- Assign each lay member a student trustee mentor. This "student-as-mentor" can answer questions on university culture and the student experience.

External Trustees (Lay Trustees)

Lay trustees are not a requirement of the 2009 charities act. However, the NUS Annual Conference in 2007 voted to support them in unions and 99.2% of unions have them (the same union that has no student trustees has no lay trustees). Unions have an average of 3.7 lay trustees (fewer than officers but more than student members).

Lay members	1	2	3	4	5	6
Unions	2	11	32	49	20	3

Most people entering a job in a new organisation will feel that it is the culture, not the structures or job role, which causes most confusion. This is amplified if you only come to the organisation 6 times a year, sit in the same room and talk to the same 12 people.

Lay trustees' induction is perhaps more onerous and more difficult to get right than student or officer trustee induction. I finished my undergraduate degree in 2005, then spent 7 years as a student officer or NUS staff member before 4 years in university roles. Coming back to learning as a masters' student at the same university I had studied at as an undergraduate, I was amazed at just how much things had changed on campus and in the classroom - and this was speaking as someone who had been a HE professional. Lay trustees will need

support orientating themselves back into the university context. This includes the unique world of students' unions and the policy context impacting on our members.

The myth of the zealous snowflake

Everyone has a view on how our society is educated and lay members may need particular signposting to the information or opinion presented in the media. Are students all zealots who fight freedom of speech? Or are they sensitive snowflakes who protect themselves from conflict and debate? Are students overworked and unable to commit to their study or simply lazy? All these views are present in the media, and lay trustees might need to see any research you have on these narratives.

Your annual skills, knowledge and diversity audit is essential in monitoring recruitment of lay trustees (as well as developing all members of the board throughout their time in office). The ability to seek specific backgrounds and characteristics is helpful in following the charity governance code's recommendations on diversity while keeping the aspects of the union that appoint through election.

You should include information about the values of your charity and what the trustee could expect to get from their experience in the advert and role description.

Nowgivesomethingback.com is a recruitment website for lay trustees where the cost of promotion in the national press is shared over several unions. Such exposure is often financially prohibitive for an individual union, but combining budgets makes this possible.

What's in a name?

It seems bizarre now but there was a lot of nervousness about having non-students on SU Boards of Trustees 10 years ago. As such, the phrase "external" trustees was invented to suggest someone who wasn't really part of the organisation but just popped in every few months. Given that these trustees have the same liabilities as students and officers and are often valued advisers for core functions like finance and HR, I prefer the term "lay" to define them as different but still integral to the union.

3 things to try

- Help connect lay trustees with student groups associated with their field or degree to share their experiences.
- Invite lay trustees to big union events – elections and awards are obvious examples but they may find chatting with staff useful at away days or strategy planning events.
- Ask existing lay trustees to create a list of things they wish they had been told when they first took up their role. This is an excellent starting point for inducting a new lay member.

Alumni Trustees

9% of all unions have a class of trustees reserved for alumni of the institution. Usually these are for a single member (6% of all unions) but 2 unions reserve 2 places for alumni and another 2 have three places for alumni trustees (both of these have fewer student trustees than average).

Understanding the character of the institution associated with the union may well be important for unions. Having someone other than the officer and student trustees to bring this angle might be desired. Where they have alumni trustees, the union should still consider the desired skills and knowledge for the board when appointing. Conversely, several unions find that they attract alumni naturally when they advertise for lay members and so can add this element of experience to the skills gained.

Alumni trustees should be treated in the same manner as lay members, though you may find that additional support is needed orientating them where the student experience is not the same as “my day”.

University Appointed Trustees

22% of all unions have someone from the institution on the board. Of those unions, 21 have 1 university appointed member, 5 have 2 university appointed members and one has 3 members of the university sitting on the trustee board. There may be additional unions who have university observers for some or all areas of the meetings.

University appointed members have traditionally indicated one of two things: a union with a close partnership approach with the institution, or one where the university feels they need a relationship which more directly scrutinises the SU. In the early days after the 2009 Charities Act, there were more university appointed trustees, but since then they have been diminishing in numbers.

A major issue for university appointed trustees is managing the conflict of interest that arises from being a trustee for a Union whose primary purpose includes criticising the organisation that they are employed by (often in influential positions). This may need special support from the Chair and board clerk.

This conflict of interest may move depending on the discussion. University staff members with responsibility for finance or academic services will find conflicts appearing more often than someone in marketing or alumni relations.

Special discussion will be needed with the university about who they are appointing and if they are aware of their role working for the advancement of the union’s strategy rather than the partner organisation.

Chair

75% of students' unions have their president or another officer as the chair of the Trustee Board (65% name the President specifically). 1 Union has a student chair, 2 leave it for the board to decide each year and the others (22%) have a lay trustee leading their board.

This topic comes up regularly with Unions asking which is "right". I have met wonderful chairs who were students & terrible chairs who were students. I've met wonderful lay trustee chairs and terrible lay trustee chairs. For me, the decision comes down to a balance for the board between its values and who they feel can best steer the organisation's governance.

A poor understanding of the chair's role is that they are there to control the meeting and appraise the chief executive. This is, of course, part of their role. But they are also the legal figurehead of the charity, its public face. For many unions, the decision to make the president chair is about them recognising the values which all students' unions have of being student led and their principle role of student representation. For them, this context means that having the representative figurehead and the legal representative as one and the same makes sense.

Recruiting a lay trustee with experience as a chair is more difficult than one without. However, if you can achieve this you can recruit a member with a solid understanding of charitable or political organisation and management challenge from the start.

There are developmental challenges and training with both roles. Officers need extra support on their role as chair, especially where that moves beyond the activity within the boardroom. Very often a lay member will act as a deputy chair and support the officer in the CEO appraisal as well as board development.

While lay members need induction into the political landscape of students' unions and the diverse decision-making functions within them, lay trustee chairs will need extra support in this. There are few charities where a large section of strategy setting is devolved to a student council, or a large chunk of the board members are chosen by popular vote rather than skills analysis. Significant time should be taken supporting lay chairs into understanding this context.

Board Clerks

I often tell the story of my third ever SU executive meeting. It was 3 weeks after my part time officer by-election. We had a rotating chair and it was my turn. So, unaided by Chair's notes, pre-briefings or (let's be honest) truly understanding the papers, I kicked off by asking the auditors to present their item. After about 5 minutes we approved £3.2M accounts and then proceeded to spend 30 minutes on which colour badge machine to spend £200 on.

This was before proper, structured trustee boards were widespread, and unions have clearly come a long way. In part, this is down to the way we hold meetings and in part the increasing focus of senior management in trustee related items. It is also a product of the professionalism of governance in students' unions.

A confession

I'm an unashamed bureaucrat. Good bureaucracy reduces stress, improves efficiency and allows an organisation to focus on delivering for members rather than servicing its own processes. A good board clerk needs to understand the people on the board, their temperaments and needs. In both the university and charity sectors, I've found plenty of people that can quote chapter and verse of the Companies Act but can't visualise what it's

like for a new member coming onto the board or sympathise with an officer unskilled in balancing their workload who hasn't got to their papers yet. As a clerk you've got to be able to push papers but also pull in and engage people.

The board clerk role is a key one and Unions should give serious consideration to who undertakes this and what skills development they might need to support a truly high functioning board. I've heard people refer to board clerks disparagingly as "minute takers" when clearly the position is much more (and minute taking is a highly underrated skill – spoken as an unashamed bureaucrat!).

3 things to try

- Set the agendas for each board for the year at the same time as the meetings so you can see how discussions will flow. Of course, they can change as needs must.
- Regularly review which strategic aims are being discussed at board level. If a paper isn't strategic, then why is it there? And if you never discuss a particular aim should it be in your strategy?
- Include clerking training in your CPD budget for the relevant staff members.

Services for students' unions

I offer a range of services to support students' union trustee boards of all sizes.

**Officer and Student Induction – contact me for details nick@nicksmithconsulting.org.uk
Flexible dates to be held in your union**

The induction of students and officers must allow Trustee Boards to work as a collective unit and appreciate the strengths of each member to ensure both conformance with legislation but also allow the students' union to perform and flourish to the benefit of their members.

While lay trustees will be appointed due to their experience, students do not always have this and so require training to give them the confidence to act as a trustee and the reassurance that they can contribute meaningfully to debates and decisions.

I offer one day training for student and officer trustees. By the end of this day they will be confident in working as a Board, acting with due diligence, looking to learn and develop as a Trustee with the support of those around them and positive about their experience.

Being a students' union Trustee Chair - £225 per delegate

Tuesday 3rd September 2019, London School of Economics Students' Union

Thursday 5th September 2019, University of Manchester Students' Union

This training is especially focused on the issues faced by SU Trustee Board Chairs who are often student officers. Recruiting and developing the other board members, managing political tensions and leading on ensuring papers are clear and accessible often come under a Chair's role. This one-day training introduces these issues and will provide pragmatic resources for them to use back in their home Unions.

“Definitely the most informative and useful piece of training I've received during my two years in office.”

Lay Trustees networking and orientation - £225 per delegate

9th September 2019, University of Westminster Students' Union

Lay (External) trustees bring great knowledge and expertise into the world of students' unions but navigating this world may be difficult for them. In addition, it may feel a unique and lonely role, however hard unions try to make them feel welcome. This half-day event will talk about the difficulties of being a lay member of a students' union board and offer practical support for trustees, insight into the students' union and university sectors and networking opportunities across different Unions.

Influencing the University

Flexible dates to be held in your union contact me for details

nick@nicksmithconsulting.org.uk

As a University manager I watched student officer attend meetings and, purely because they didn't understand the power dynamics, fail to make their points. This training looks at the power structures of the university and the key individuals who must be identified and lobbied to make change. It will discuss the techniques officers need to consider to get the most out of meetings including preparation and tracking follow up. It will discuss personality types within the meetings as well as the key roles held on committees and the responsibility they have. Outside of meetings it will look at how individuals can be influenced informally.

I also offer a staff version of this training to help support officer teams.

"Fab Training with Nick – he really gets officer Life!"

Other services

As an experienced trainer I have a range of courses on offer, including productivity, board clerking and "Train the Trainer".

I have provided coaching for student and lay trustees as well as students' union staff members. Unions have also used me to prepare officers for the world of work with CV and interview practice and discussions about the world of work.

Methodology & the future of this report

The information in this document about trustee boards was gathered from the websites of students' unions or their social media. The information was gathered up to 11th February 2019.

If you are reading this and thinking "I wish there was more information on x" then I want to hear from you. One limit is that students' unions are busy places and taking time to answer emails and surveys when time is sparse is rightly deprioritised under changing students' lives for the better. However, in the future it would be good to expand this research to include an indication of board diversity, methods of appointment and frequency of meetings. This can only be done with direct involvement from SUs but if this report is useful for enhancing governance in the sector, then it could be beneficial.