

## **Managing Change: how we can help service user trustees to cope**

A few years ago **KeyRing** underwent a restructure that saw a period of significant change for the organisation. Their trustees had to meet many of the challenges which boards will face today. **Tracy Hammond** shares some of the organisation's lessons from this time.

*NB. KeyRing refers to its service users as 'members'.*

A few years ago KeyRing underwent a restructure that saw a period of significant change for the organisation. Although the primary driver was continued growth, and there was no thought of closing services, KeyRing's trustees had to meet many of the challenges boards will face today.

### **Confidentiality**

Service user trustees will sometimes find themselves in the potentially difficult position of having to maintain confidentiality whilst participating in the services and projects they have discussed as a trustee. For many service users, access to privileged information will not be a new experience: they will have been involved in the recruitment of staff and will have interviewed staff known to them when a promotion opportunity arises.

Cross referencing to other activities aids the effectiveness of training on issues such as confidentiality so good records about training are immensely helpful.

The old adage that 'the easiest way to keep a secret is without help' is not usually applicable for service user trustees and would place them in a lonely and stressful position. If service user trustees are to be expected to maintain confidentiality in their day-to-day interaction with staff, they need to know with whom they can discuss difficult issues and where they can go for support.

For this reason KeyRing instigated a buddying system where member trustees are linked to non-member trustees. This allows people to have contact with each other outside of meetings and to receive support if needed.

Our experience is that it is important for the Board's Chair to be clear about the status of information and discussions. It should be made clear what is and what is not confidential as service user trustees could err on the side of caution and not share legitimate information. In the long term this might cause a breakdown of trust between the trustees and the people who elected them.

### **Training**

KeyRing has always tried to ensure that member trustees have the support they need to take a full part in the complex decisions that are necessary when governing a national organisation.

For this reason, our member trustees receive training about Full Cost Recovery, the difference between direct and indirect costs, service level agreements and other topics which they may not have encountered before. We do this by using real life scenarios to introduce the concepts. Questions about a night out are, for example, a favourite way to illustrate full cost recovery and contributions to central cost. If a friend can't afford to pay their full share of a taxi fare should they be allowed to pay what they can and join in the fun?

Is it better for the other passengers to receive a contribution to the costs rather than going alone? At what point does it become unfair that others are paying more for their fellow reveller? Once member trustees are confident in their handling of the concept, we discuss how this might work in an organisational setting. We introduce such issues to our member trustees at the earliest possible juncture and then revisit ideas as needed in our pre-meeting preparation time.

We find this balance allows people to meet concepts with confidence and focus on making the right decisions, rather than judgement being clouded by anxiety over unfamiliar concepts. Like many other organisations, KeyRing has well-rehearsed training and support are able to fully participate in decisions made by the board. These include:

- Multi-disciplinary meeting preparation (eg. the Finance Director discusses financial matters with member trustees before the meeting)
- Easy read papers
- Presentation-based (rather than paper-based) meetings
- The use of smaller working groups.

These all assist the process of informed decision-making but the most essential resource is time and none of the above are effective when hurried.

### **Strategic thinking**

Member trustees have an intimate and invaluable knowledge of KeyRing life at a local level. We have spent a lot of time on the challenge for everyone of how to make best strategic use of their knowledge. For us, success with strategic thinking has come from supporting members to gain a good understanding of how and at what level decisions are made.

We draw huge organisational charts on the training room floor and play 'decision run-around' in which members have to go to the point of the chart at which varying decisions are made. This, along with likening the work of the board to a driver undertaking a rather eventful journey to 'Mount Mission Statement', helps to provide clarity of purpose.

We also ensure that local involvement structures remain strong; if front line workers do not take local comments seriously, member trustees will understandably want to discuss local matters at a trustee meeting.

### **Stress Management**

Good stress management for service user trustees is important to ensure they are equipped to make good decisions. Charities clearly have a moral obligation to support the well-being of service users who sit on their boards. Their legal obligations are quite simple: an organisation must take reasonable precautions and exercise due diligence to ensure that people are not harmed by their involvement.

Alongside trustee-buddying arrangements, KeyRing also spends time discussing the role of a trustee. An effective discussion around conflict Charity Commission requirements are understood, it will also acknowledge the difficulty of divided loyalty and allow people to recognise the stress this may bring. Whilst difficult decisions may still have to be made, people will feel more comfortable if they are confident they have fulfilled the requirements of their office.

The style of decision-making will also have an impact on the stress levels of trustees. At KeyRing formal votes with hands raised are very rare. Rather, there will be a discussion and the chair will elicit all views and majority agreement will be reached.

For this style of decision-making to be inclusive it is important that member trustees are well prepared.

KeyRing's preparation day is fundamental to our member trustees' ability to participate. Pre-meeting preparation takes place with senior staff, who also attend the trustees meeting, so there is always someone on hand to support members to express their views.

Resources invested in good support for service user trustees will result in better and more representative decisions, a lower turnover of trustees and good links with the wider membership.

### **Further information**

The Charity Commission provides a wealth of guidance on managing the current economic situation and also supports service user involvement with the following publications:

CC24 'Users on Board' which provides guidance for charities on service user involvement.

CC3 – easy read 'Being a trustee' which provides easier to read information for service user trustees.

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*KeyRing would be happy to share its training ideas.*

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