

Top tips on taking forward a shadowing programme

Did you know that trustees of charity Boards are predominately white - in fact only 8% of trustees are from racialised minorities; made up of older men from well educated backgrounds - the average age of a trustee is 61 (only 3% of trustees are under the age of 30) and seven out of ten trustees are men.

Conversely working class people, younger people, people from racialised minorities, people with disabilities and LGBTQ+ people are not well represented at all; lived experience expertise is also undervalued and under-represented, especially compared to practice and learned expertise.

We also know when openly recruiting (and only about 10% of board roles are openly recruited, 90% choosing to recruit by word-of-mouth or from existing networks) people from diverse background do apply but are still not getting appointed to the same extent as their white

counterparts [[Board diversity: The candidates are there, the problem is how charities recruit | Reach Volunteering](#)].

So what can charities do to support a greater diversity of people to have the confidence to apply and an opportunity to secure such roles. One simple approach I have been championing as Trustee at Smallwood Trust is a shadowing programme. That is providing the opportunity for people (in the case of [Smallwood Trust](#), women with lived experience of financial hardship) to shadow existing Board members. We recently had a [webinar](#) on this approach and this piece seeks to draw out some top tips for others thinking of implementing such a scheme.

There is no blueprint for doing this work as much will depend on the culture of your organisation, the personality of your Board members and indeed your shadowees, but below are some tips that I hope will support your thinking.

Top ten tips for setting up a shadowing programme:

- 1 **Ask yourself, is your Board ready to provide a supportive and inclusive environment to new people that may be different to them:** [Getting on Board](#) offer good training in this area.
- 2 **Agree which Board member(s) will champion/be shadowed:** At Smallwood one Board member was shadowed.
- 3 **Get Board buy in/sign up to taking on shadowees:** before the idea was taken forward Board approval was sought by the CEO and the Board champion of the scheme.
- 4 **Make a decision about what your person centred, trauma informed application process is:** Smallwood went for a very light touch approach with no formal application. Instead people were asked to express an interest via an email. The chance to talk through the opportunity was open to all. No guidance was issued so people could write as much or as little as they wanted. Direct applications as well as nominations by others were considered. One lesson has been to ensure this is a trust-based process – so if you are asking for people with lived experience for example then you simply ask ‘Do you have lived experience of...? yes/no?’. Avoid asking people to detail this lived experience as this can be triggering and not feel respectful of their privacy.
- 5 **Set out what this opportunity is and who it is for and publicise this:** Smallwood put this out on LinkedIn and to their network of grant holders - [Opportunity to shadow Smallwood Board member | Smallwood Trust](#).
- 6 **Set some shortlisting criteria:** Smallwood used the following criteria loosely to support a conversation between the Board lead and CEO about who to offer this opportunity to. Before confirmation the Board lead met (via zoom) each candidate - this was pitched as the opportunity for both sides to get to know one another and make an active decision if they wanted to pursue - it was important that both sides felt comfortable and the chemistry worked.

- **Evidence of lived experience (Y/N)**
- **Personal development rationale (Y/N)**
- **Would use experience to seek future board / other opportunity(Y/N)**
- **Is a Smallwood grantee / beneficiary (if known)? Y/N**
- **Comments / overall fit with opportunity**
- **Decision**

As noted in (4) above I would not, in hindsight, ask for evidence of lived experience now. Also in reality the motivation of the women for pursuing this opportunity varied from building networks, understanding how a funder works, gaining insight into good governance, building a foundation that will help to step into the world of paid work. The primary motivation was not to become a Trustee (even though 2 of the shadowees have since felt confident enough to apply and secure trustee roles). For me the learning is: don't limit this opportunity to just aspiring trustees.

- 7 Support a cohort model:** Smallwood Trust decided to take forward 3 people and a key learning has been that a cohort model works well and is a supportive way to take this forward.
- 8 Make a decision how long your shadowee placements will be for:** Originally it was envisaged the placement would run for 6 months - however in reality the placements will be for a year, and this feels like a better time period to give enough exposure to the Board and various committees that take place throughout the year.
- 9 Develop a document that makes explicit the roles and responsibilities of the charity to the shadowee and vice versa:** Smallwood Trust developed and got the Board approval of [this document](#) - key things worth highlighting are:
 - a. Each shadowee was given a training budget they could draw on (in addition to regularly being reminded that they can claim all expenses incurred, including childcare, travel, subsistence etc).
 - b. It was agreed shadowees would have observer status at board meetings (this was with agreement of the Chair and shadowees - you may want to check what your governing document allows too).
 - c. Shadowees could attend other Board events by invitation or request - e.g. attend grant decision making panels...
 - d. Shadowees have the opportunity to meet other Board members outside of the formal meetings.
- 10 Ask don't assume:** understand the communication style of each other and regularly check in. If you are not sure just ask the shadowees what they think and would prefer - don't assume: At Smallwood Trust the Board lead has a regular bi-monthly diarised check-ins which can be used by shadowees to drop in if they wish to; there is the option to attend pre-brief meetings to each board meeting with the CEO and Board lead to talk through the board papers and the option for a post brief meeting to talk through any issues that arose at the meeting. With agreement of shadowee the Board lead and shadowees also have more informal channels of communication, e.g. use of WhatsApp.

Other related articles of interest:

[Meet the Smallwood Board member shadowees | Smallwood Trust](#)

[Reflecting on our Inaugural Board Shadowee Experience | Smallwood Trust](#)

This work is being written up as a case study and this can be found here:

[Lived experience: Overcoming the barriers | Bayes Business School \(city.ac.uk\)](#)

If you are thinking of adopting this in your organisation and would like to talk to someone, please feel free to contact: ambreenashah@gmail.com