

Step on Board

Guidance for participants

Thanks to the National Lottery Heritage Fund and players of the National Lottery, we are launching our young trustees initiative, Step on Board, on 3rd November during Trustees' Week. This new initiative will match young people aged 18-30 with Heritage Network member organisations who want a young person's perspective on their board.

Following a consultation with the Heritage Network's Youth Forum, and advice from the Young Trustees Movement and Board Racial Diversity UK, the Heritage Network has designed the initiative to achieve the following outcomes:

- Develop a pipeline of young trustees
- Improve the capacity and confidence of potential young trustees
- Collect and share stories and experiences of existing young trustees to inspire and inform others
- Amplify diverse voices and change perceptions of trusteeship
- Improve our members' chances of success through diversifying their boards

Aims

- Increased awareness and understanding of trusteeship amongst young people
- Increased representation of young people as trustees on charity boards
- Improved recruitment and retention of young people as trustees
- Provide support, opportunities and ways into trustee roles for more young people
- Help our members to diversify their boards and address trustee succession issues

The importance of board diversity

[The Charity Governance Code](#) states that "Diversity, in the widest sense, is essential for boards to stay informed and responsive and to navigate the fast-paced and complex changes facing the voluntary sector. Boards whose trustees have different backgrounds and experience are more likely to encourage debate and to make better decisions". The Heritage Network staff team is often involved in conversations around good governance and in our experience the more diverse your board is, the more successful your organisation is.

According to the [Young Trustees Movement](#) less than 3% of charity trustees are aged under 30. Unfortunately this means that boards across the UK do not accurately represent their communities, staff, volunteers, customers or beneficiaries.



Young trusteeship is a great experience that can boost your career. It can help you:

- Develop skills
- Grow your network
- Learn how charities work
- Learn about governance
- Make a difference to the world!

How Step on Board works

- Young people aged 18-30 can apply to be matched with a Heritage Network member organisation
- There will be one cohort of young people each year
- We envisage that the young person will be a 'shadow trustee' for 1 year. Note that a trainee trustee will not be registered as a Director with Companies House (or equivalent) or the Charity Commission.
- We arrange these opportunities as time-limited traineeships because it provides a less daunting way for a young person to participate in organisation governance. At the end of the year you and your host organisation may decide that you can be voted onto the board as a full trustee, but neither party should assume that the relationship will continue.
- You will be assigned a 'board buddy' who will be your mentor while you are a shadow trustee

Host organisations

You will be matched with a non-profit organisation that:

- is a member of the Heritage Network
- wants to diversify its board
- will undertake training to ensure their board is ready to welcome a young shadow trustee
- will appoint a board buddy who will be your mentor

Timeline

Activity	Date	Details
Launch	3/11/25	Launch the initiative during Trustees Week



Online 'Discovery Cafe' information session for young people	Late 2025	Online information session.
Receive applications from young people and host organisations	From November 2025	
Matching process	From November 2025	
Successful young people and host organisations notified	On a rolling basis	
Introductory online 'Discovery Cafe' for young people	20 th November 2025. (This may be repeated depending on the demand)	An online group session for the young people to meet each other, start to build a supportive community and gain an introduction to the initiative.
Introductory online meeting	Late 2025/early 2026 (dependent on volume of applications received)	We will introduce the young person to their host organisation and Board Buddy. To be attended by the Board Mentor, Participant and up to 3 other staff/trustees from the partner organisation if they wish. This is an opportunity for the Participants to discuss their goals for the programme with their Board Mentor and set any expectations together. 1 hour.
Training for young people	Early 2026	What is a trustee and what to expect from being on a board and more...
Training for host organisations	Early 2026	How to ensure your board is ready to welcome a

		young person onto it, EDI and more...
Mentoring sessions	To be organised with board buddy.	Young person and board buddy meet every 2 months for around an hour. Aim to meet 4 or 5 times during the initiative. They will set their own times, locations and agendas for these meetings. It might be useful for the first session to take place just before the young person's first board meeting to go through board papers.
Board meetings	Board buddy will provide details.	Participant to attend as many board meetings as possible during the initiative. We expect boards to enable you to join online if preferred.
Post-board meeting debrief	To be organised with board buddy.	Board buddy and young person to email/call to debrief/discuss
Participant session	To be organised by the Heritage Network.	1 group check-in session half way through the programme. This may also include hearing from established young trustees who will share experiences, advice and insight.
Organisation check-in	To be organised by the Heritage Network.	Two online check-in sessions during the initiative. To be attended by the board buddy and main contact (CEO/Chair can attend if they wish).
End of initiative celebration event for young people	TBC	

Learning and evaluation session for host organisations	TBC	We will bring together host organisation to gather feedback from the initiative and share learnings around increased representation on trustee boards. Approx 90 minutes.
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Participant role and responsibilities

Managing time and commitment

- Make sure you balance your participation as a shadow trustee with other commitments
- Your host organisation will facilitate your online attendance at board meetings as much as they can
- You may wish to discuss your shadow trusteeship with your employer, sharing how it will support your professional development and discussing the possibility of them giving you flexibility to attend board meetings if required

Understanding the role of a trustee

- Familiarise yourself with the key responsibilities of charity trustees, including legal obligations, strategic decision-making, and safeguarding the charity's mission
- Consider what you hope to gain from this experience and set learning goals. Are you looking to understand charity finances, develop leadership skills or learn about strategic planning?
- Don't be afraid to ask questions about language, acronyms, processes or the charity's work. This can clarify expectations and deepen your understanding

Clarify expectations with your Board Buddy

- Work with your Board Buddy to establish what your involvement with the board will look like. Will you primarily observe, or are there areas where you'll contribute actively?
- Set meeting times and communication preferences. Agree on when and how you'll communicate, both before and after meetings. Be upfront about your own availability and any potential scheduling conflicts.
- Clarify whether you will attend meetings online or in person, and the process for claiming travel expenses

- If it is of interest to you, discuss your involvement in any board sub-committees that you particularly want to learn from or contribute to

Get to know the charity

- Read and key documents that are provided to you. Familiarise you with the charity's website, strategic plan, and recent annual reports to understand its mission, vision and values
- Research the broader context in which the charity operates, including current challenges, opportunities and trends that may affect its work

Working effectively with your host charity and board

Professional conduct and confidentiality

- Many board discussions will involve sensitive information. Ensure you understand what can and cannot be shared outside of the boardroom and maintain confidentiality where required. When in doubt, ask your Board Buddy for guidance
- Always approach board meetings and interactions with professionalism, respecting the perspectives and expertise of the trustees and staff members

Build positive relationships

- Approach each meeting and discussion with an open mind and show genuine curiosity and interest in the charity's work and the perspective of board members
- Use opportunities to build relationships with the board and staff. Introduce yourself to other trustees, ask about their experiences and show appreciation for their support

Participate in board meetings

- During meetings, take detailed notes to capture key discussions, decisions, and any observations that can aid your learning
- While your primary role may be to observe, there will be opportunities to ask questions or seek clarification. Check with your Board Mentor beforehand on the best times to do this
- Feel free to contribute and share your thoughts. Your unique perspective can add valuable insights to the board.

Adapt to the Board's Culture

- Every board has its own culture and dynamics. Take time to learn these, observe how decisions are made, who the key influencers are, and how differing views are handled.



- Respect and follow the protocols and procedures of the board, such as how agenda items are raised and how voting or decision-making processes work. Speak to your Board Buddy to understand more about these, and feel free to question and challenge these processes.

Maximising Your Mentoring Relationship

Establish a Strong Relationship

- Spend time getting to know your Board Buddy - share your backgrounds, experiences and motivations
- Maintain regular communication with your Board Buddy. Be proactive in scheduling meetings, preparing questions, and sharing your reflections
- If there are areas where you feel unsure or need more support, share this with your Board Buddy. The more they understand your needs, the better they can support you

Make the Most of Pre- and Post-Board Meeting Sessions

- Use pre-board meeting sessions to discuss the agenda, key issues, and any questions you may have. This will help you feel prepared and confident going into the board meeting.
- After each board meeting, debrief with your Board Buddy to discuss what you observed, clarify anything, and reflect on your learnings

Give and receive Feedback

- Be open to receiving feedback from your Board Buddy and other trustees. Use it to identify areas for improvement and celebrate your progress
- After key interactions or meetings, take time to reflect on what went well, what didn't, and what you would do differently next time
- Provide regular feedback to your Board Buddy and host charity on what is working well and areas for improvement

Navigating Challenges and Maintaining Balance

Addressing Barriers to Participation

- Be transparent about your availability. If you are unable to attend a meeting or event due to other commitments, communicate this as early as possible. Your Board Buddy and the board will understand and work with you to find alternatives



- If you encounter any barriers, such as time constraints or feeling overwhelmed, raise these with your Board Buddy. They can offer advice, adjust expectations, and help you find solutions
- Set boundaries around your availability and communicate them clearly to your Board Buddy
- It's okay to step back or take a break if you're feeling stretched. Speak with your Board Buddy about any adjustments needed to maintain a healthy balance
- Communicate with the Heritage Network to discuss any issues you are facing on the programme

Developing Your Skills and Knowledge

Seek Out Learning Opportunities

- If there are topics or areas where you want to deepen your understanding (e.g. financial oversight, governance best practices), ask your Board Buddy for recommendations or resources
- Participate in any available training sessions or workshops to strengthen your skills and knowledge as a prospective trustee
- Keep a journal to track your experiences, observations, and reflections throughout the programme. This will help consolidate your learning and serve as a useful reference
- Periodically review your goals with your Board Buddy and see how far you've come. Celebrate achievements and identify areas to focus on in the remaining months of the programme
- Reflect on your future interest in trusteeship. If you feel ready, discuss potential opportunities with your host charity or explore other trustee roles in the sector

Network and Build Connections

- Take advantage where possible, of any opportunities to attend board-related events, sector conferences, or networking sessions
- Connect with other programme participants to share experiences, insights, and build a supportive peer network

APPENDIX A

Code of Conduct for shadow trustees



As a participant of Step on Board, you commit to:

- Proactively engage with the programme:
 - Commit to attendance at agreed board meetings, events and training sessions as far as reasonably possible
 - Have a pre-meeting with your Board Mentor ahead of each board meeting you have agreed you will attend
 - Have a debrief meeting after each board meeting you have shadowed
 - Meet a minimum of 4 times during the programme period (every other month) for mentoring sessions to increase general knowledge and understanding of the role and responsibilities of being a trustee, and increase confidence to eventually apply, secure and sustain a trustee role
 - Communicate regularly with your cohort of Participants to build connections, share experiences and learnings and support each other
 - Attend check-in meetings with the Programme Coordinators
- Follow the board's policies and procedures as well as any instructions or directions reasonably given
- Engage in any standard volunteer onboarding procedures including completing a Declarations of Interest Form, a DBS check, gaining references etc. (as requested)
- Exercise caution and care with any documents, material, or devices, containing confidential information
- Act in a way that is in line with the purpose and values of the board and that enhances the work of the board you are shadowing
- Direct any questions regarding the board's policies, procedures, support or supervision to your Board Buddy
- Act honestly, responsibly and with integrity, treating others with fairness, equality, dignity and respect
- Address any issues or difficulties about any aspect of the programme to the Heritage Network in the first instance
- Commit to supporting the evaluation and feeding back on learning from the programme

Participants are expected **NOT** to:



- Bring the board into disrepute (including through the use of email, social media and other internet sites, engaging with media etc.)
 - Seek or accept any gifts or rewards during the course of the programme
 - Engage in any activity that may cause physical or mental harm or distress to another person (such as verbal abuse, physical abuse, assault, bullying, or discrimination or harassment on the grounds of gender, civil status, family status, sexual orientation, religion, age, disability or ethnicity)
 - Provide a false or misleading statement, declaration, document, record or claim in respect of the board, its volunteers, employees or board
 - Engage in any activity that may damage property
 - Take unauthorised possession of property or documents that does not belong to them
 - Improperly disclose, during or after their involvement with the board ends, confidential information gained in the course of their placement with the board
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CONFIDENTIALITY

You must not give, or disclose to, any other person or organisation, except as required by law, confidential or sensitive information to which you have access in the course of your shadowing placement in relation to the business, finances or affairs of the charity board you are placed in. All information relating to the board you observe and its associates, beneficiaries and suppliers, however stored, will be the property of the board and you must not keep such information nor use it for your own purposes. This restriction will not apply to information which becomes public other than through unauthorised disclosure by you. When your shadowing placement ends (or any other time if you are requested to do so), for whatever reason, any such information in your possession must be handed back to the board.

DATA PROTECTION

You consent to your host charity holding and processing, both electronically and manually, the data it collects in relation to you, in the course of your shadowing placement, for the purposes of the host charity's administration and management and its business and for compliance with applicable procedures, laws and regulations and to the transfer, storage and processing.



You consent to follow the charity or organisation's data protection and/or privacy policies including the safe storage, transfer, destruction and removal of board data, information, and papers.

Where a Participant is found to be in breach of the standards outlined in this Code of Conduct or any of the board's other policies and procedures this may result in the shadowing opportunity/placement being terminated. Participants acknowledge that no employment relationship is created in the context of their shadowing/placement opportunity.

The Heritage Network and the Participant are responsible for ensuring that this Code is implemented effectively.

Signed:

----- (Participant)

