

# Step on Board

## Guidance for host organisations

Thanks to the National Lottery Heritage Fund and players of the National Lottery, we launched our young trustees initiative, Step on Board, during Trustees' Week in November. 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.

Thinking about how a young person will experience being on your board will help you improve the way you run your trustee meetings. This will benefit all board members and help you recruit and retain trustees in the future.

Young trusteeship is a great experience that can boost a young person's career. It can help them:

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

## How it works

- Network and Network+ level members can apply to participate in the initiative. Connect level members can apply, but must upgrade in order to be matched with a young person
- There will be one cohort of young people each year
- We envisage that the young person that you have been matched with will be a 'shadow trustee' for 1 year. Note that a shadow 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 may decide that you want the young person to become a full trustee, but neither party should assume that the relationship will continue.
- You will be required to nominate a 'board buddy' who will be the young person's mentor while they are a trainee trustee

## Participants

Your organisation's board will be matched with a young person who:

- is 18-30 years old
- has no previous experience of being a trustee



## Outcomes, activities and timeline

Activity	Date	Details
Launch of application form for young people	3/11/25	Launch the initiative during Trustees Week
Launch of application form for host organisations	15/12/25	
Matching process	Starts 15/12/25	
Successful young people and host organisations notified	On a rolling basis from January 2026	
Introductory online meeting	Early 2026 (dependent on volume of applications received)	<p>We will introduce the young person to their host organisation and Board Buddy.</p> <p>To be attended by the Board Buddy, young person and up to 3 other staff/trustees from the partner organisation if they wish.</p> <p>This is an opportunity for the Participants to discuss their goals for the programme with their Board and set any expectations together. 1 hour.</p>
Training for young people	Early 2026	What is a trustee, 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 by the 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 the young person to join online if in-person meetings are impossible for them.
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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## Host organisation role and responsibilities

As a host organisation you will:

- Facilitate a young person observing and engaging in a full year's cycle of board meetings
- Allocate a trustee from your board ('board buddy') to mentor the young person, guiding them through the intricacies of governance, decision-making, and strategic planning as well as preparing them for, and debriefing from board meetings
- Aim to provide the best experience for the participant and for your board to get the most out of the experience
- Understand and take into account the challenges that young people face in taking up leadership roles and introduce the value of lived experience to your board
- Facilitate online attendance to meetings as far as reasonably possible
- Offer travel expenses to be paid for the young person to attend any in-person board meetings, board strategy/away days etc.
- Engage the young person in any standard volunteer onboarding procedures including carrying out any DBS check, gaining references etc. at the organisation's expense

## Accessibility and inclusion

The Heritage Network is committed to being as accessible and inclusive as possible and this extends to the Step on Board initiative for all participants. While the young people have expressed a commitment to engage fully in the programme, host organisations should understand that there may be occasions when they cannot attend certain meetings or activities due to other commitments, unforeseen circumstances, or competing priorities.

Host organisations recognise that young people often do not have the privilege or flexibility to volunteer large amounts of unpaid time, hence their low representation on charity boards. As such, they will strive to reduce barriers and remain flexible to accommodate their needs. Board buddies and boards are encouraged to approach scheduling with empathy and



understanding, facilitate online attendance to meetings as far as possible, and work with the young people to create a supportive environment that balances learning opportunities with their existing responsibilities. This flexibility is integral to fostering a positive and impactful experience, ensuring that all young people can meaningfully engage with the initiative without feeling overburdened or disadvantaged.

## Preparation and Onboarding

### Board's Commitment

- Ensure that your board and charity are committed to fostering an inclusive environment, valuing diverse perspectives and backgrounds and helping to shift power dynamics. This should include taking time to critically examine how you currently run your board to ensure that it will provide a positive experience of not-for-profit governance.
- Secure agreement from all board members to support the participant, recognising the potential benefits of their insights and experiences, in particular, their lived experience.

### Assigning a Board Buddy

- Choose a trustee with strong communication skills, and a commitment to diversity and inclusion to mentor the young person.
- The mentor will guide the participant, offer insights into the organisation's operations, and help them understand the governance process.
- The Board Buddy should be available for meetings before and after each board meeting, as well as throughout the programme as set out in the table above.

### Participant Onboarding

- Provide the young person with background information on the organisation's mission, vision, values, and key projects.
- Where possible, facilitate the young person getting to know the organisation's work either via seeing it in action or talking to staff.
- Ensure the young person has a clear understanding of what a trustee does, including legal responsibilities, decision-making processes, and fiduciary duties.
- Discuss their involvement in any board sub-committees that they have a particular interest in. This is not an essential part of the programme, but can be an extra learning opportunity if the young person has the desire and time.
- Share relevant materials such as strategic plan, annual report etc.\*

\*Please note that the young person will sign a Code of Conduct and agree to adhere to confidentiality and data protection requirements – See the example in Appendix A below.

## Observing and Engaging in Board Meetings

### Before Each Meeting

- The young person should be given access to observe all board meetings over the course of the programme, including subcommittees and working groups where appropriate.
- The Board Buddy should meet with the Participant prior to each board meeting to explain the agenda, background information on key issues, and any particular dynamics of the board.
- Provide the young person with the agenda, minutes from the last meeting, board papers and any other reports or documents to be discussed.

### During the Meeting

- The young person should observe how trustees discuss issues, make decisions, and manage their legal and ethical responsibilities.
- The young person should be invited to contribute during discussions, ask questions, share their thoughts, and offer insights when relevant, so far as they are comfortable to do so.

### After Each Meeting

- The Board Buddy should meet with the young person to discuss what was observed. This may include reviewing the decision-making process, discussing key takeaways, and answering any questions.
- Encourage the young person to reflect on the meeting, considering both the process and the outcomes. Ask what they found surprising, what made sense, and any challenges they perceived.

## Good Mentoring Practice

### Establish Trust and Rapport

- From the outset, establish an environment of trust, safety and mutual respect. Make it clear that the mentoring relationship is a space for open dialogue, questions, and learning.

- Take the time to understand the young person's background, interests, goals, and motivations, and share your own. Acknowledge any differences that might affect the dynamic of your mentoring relationship and discuss.
- Encourage open communication and ensure that the young person feels comfortable reaching out with questions or concerns outside of scheduled meetings

### Cultural Sensitivity

- Recognise and acknowledge any differences between you and your mentee in terms of background, demographics, culture, and lived experiences that might shape how you both perceive the mentoring relationship.
- Be open and proactive in creating space for dialogue around these differences, as they can influence perspectives on communication styles, professional norms, and expectations.
- Approach these conversations with empathy, humility, and a willingness to listen. By being aware of and discussing these dynamics, you can foster a more inclusive and equitable mentoring relationship, ensuring the participant feels respected, valued, and fully supported in their journey to understanding trusteeship. This awareness can also help address any potential unconscious biases and contribute to a positive, culturally sensitive mentoring experience.

### Set Clear Expectations

- Be clear about your role as a Board Buddy, the scope of your guidance, and the structure of your interactions (e.g., frequency of meetings, preferred communication channels).
- Work with the young person to refine their goals for the programme. Revisit these periodically to assess progress and adjust as needed.
- Discuss confidentiality early in the relationship, especially concerning sensitive board discussions. Make sure the young person understands what can and cannot be shared outside the boardroom.

### Active Listening

- Practice active listening by fully concentrating, understanding, and responding thoughtfully to the young person's words. Show interest through non-verbal cues (e.g., nodding) and avoid interrupting.
- Use open-ended questions that prompt reflection and discussion, such as "What are your thoughts on that decision?" or "How did you feel about the way the issue was handled?"



### Provide Constructive Feedback

- Frame feedback by acknowledging the young person's strengths before discussing areas for improvement. Use the "SBI" model (Situation, Behaviour, Impact) to structure feedback clearly and constructively.
- Instead of immediately offering solutions, ask guiding questions that help the young person to reflect on their actions and decisions, such as "What do you think worked well?" and "What would you do differently next time?"

### Tailor Your Communication Style

- The young person will have their own learning style and preferences for communication, so adapt to their needs. Some may prefer in-depth discussions, while others might benefit from concise, action-oriented advice.
- As a trustee and an experienced professional, be aware of the inherent power dynamics. Make an effort to create a dialogue that feels collaborative rather than authoritative.

### Model Good Governance Practices

- Show, through your own conduct, what effective trusteeship looks like—this includes transparency, accountability, inclusion and a commitment to the organisation's mission.
- Whenever possible, use real-world examples to illustrate how ethical considerations are integrated into board decisions.

### Demystify the Boardroom

- Young people may be unfamiliar with formal governance language and processes. Take time to explain terms, acronyms, and the flow of board meetings.
- Provide explanations on key governance concepts such as risk management, compliance, strategic planning, and financial oversight.
- Discuss the decision-making process with the young person, including how trustees weigh different factors in making decisions, balancing short-term needs with long-term sustainability.
- Share insights into the nuances of board culture, such as when to speak up, how to phrase dissenting opinions, and strategies for influencing board decisions.
- Pose strategic questions and challenge assumptions to develop the young person's ability to think like a trustee. For example, ask, "What are the potential risks and benefits of this approach?"

### Knowledge and Skill Development

- The young person will attend training sessions as outlined above. The Board Buddy should help to put learning in context through sharing and discussing real-life scenarios, success and challenges.
- Encourage the young person to attend charity sector events, conferences, or networking opportunities to further their learning and connections.

### Feedback and Evaluation

- The Board Buddy should provide regular constructive feedback to the young person, helping them understand areas for growth and development as a future trustee.
- Create a safe space for the young person to share their thoughts on their experience, the mentoring process and provide feedback to the Board Mentor as well.
- The young person will complete pre and post programme monitoring forms to assess the impact of the programme

### Addressing Potential Issues

- If the young person's expectations of the programme differ from what you can provide, address this early and adjust expectations collaboratively.
- If a sensitive or difficult topic arises (e.g., issues of discrimination or bias), approach the conversation with empathy, remain non-judgmental, and provide support in navigating these challenges.
- Contact the programme coordinator for support to discuss any issues

### Maintaining Boundaries

- While it's important to be available, set boundaries around when and how the young person can reach you to maintain a healthy balance.
- Remember that your role is to provide guidance and support, not to solve the person's problems for them. Empower them to take ownership of their development.

## APPENDIX A – An example of the Code of Conduct for shadow trustees

As a Shadow Trustee, you will:

- 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

Shadow Trustees 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.

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## 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 Shadow Trustee 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:

----- (Shadow Trustee)