

# Governance support and advice – getting it right

The new Charity Governance Code makes a series of recommendations about board effectiveness.



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## Governance expert Tesse Akpeki looks at the options for trustees when reviewing their governance

Principle 5 of the recently released Charity Governance Code (see the article on pages 8 and 9) recommends that charity boards should regularly review their own performance, and that larger charities should carry out an external evaluation every three years. This article highlights some tried and tested methods of governance development.

### A governance review

A review of the organisation's structures, processes, policies and systems can establish whether they are still appropriate for enabling the organisation and its trustees to work effectively. The board identifies, evaluates and analyses what is going on, leading to recommendations based on the data and findings that emerge.

### Trustee training and development

Training and development keeps the board up to date, raises its levels of awareness and ensures it is adequately equipped to lead the organisation.

### An away day or retreat

Board and staff take time out together to consider

strategic issues, with opportunities for team building, team working, exploration and problem solving.

### Facilitation

A facilitated governance-evaluation process creates a space of safety, and helps the group work well together, operate effectively, address simple or complex issues and reach consensus. Those participating in the process can share their insights, concerns and ideas.

### Questions to consider before a governance development process

- What would success look like?
- Do we need facilitation, training, coaching, mediation, team building or a mixture of them all?
- What do we want to be able to do after the governance development exercise that we can't do now?
- What is the budget for board development and do we need more resources?
- Can the services of a volunteer be used? If yes, what are the risks?
- Do we need an internal or external consultant?
- What role will the board/chief executive/staff play?
- How will progress be evaluated and monitored?

Governance review	Trustee training and development	Away day	Facilitated discussion
Why have a governance review? Why now?	What understanding are we seeking?	What is the theme of the day – exploration, formulation of a new vision, social interaction, team building, time for reflection and celebration?	What issues or concerns need to be addressed?
What should the review cover?	What information do we need?		What level of clarity is likely to be achieved?
Who should receive feedback?	Do all the trustees need training or just new trustees?		Who should participate?
What can be done internally by reference to the Charity Governance Code and other materials?	Should the training be available to other people in the organisation, e.g. senior management?	What is the desired outcome? What would success look, feel or sound like?	How will information be presented?
	How can the learning be consistently updated?	Who should participate and for how much of the day? Should board or staff attend together?	What are the boundaries of confidentiality?
Who should be involved in the consultation/review process – trustees, staff, volunteers, beneficiaries, stakeholders?	What time can be set aside for governance development? Should this be as standalone events or as an add-on to regular trustees' meetings?	What preparation/research is needed to gain the maximum benefit from the event?	How should information be disseminated? Who needs to be informed? What support might be needed afterwards?