

SHADOWEES PROGRAMME EXTERNAL EVALUATION

Background

The Smallwood Trust's purpose is to enable women on low incomes to become financially resilient. It provides grants to organisations and individuals and works with selected partners to help women overcome financial adversity and improve their social and emotional wellbeing.

The Trust seeks to increase diversity in its governance by hearing the widest range of voices around the Board table. It wanted to do something practical to demonstrate how lived experience is of equal par to professional skills, and is something that can be recruited for, in addition to other skills. It is committed to grounding this learning and improvement in its own practices and saw the Board Shadowing Programme as a way of embedding DEI in grantmaking at a strategic level.

Opening doors for women working at grassroots level

The Shadowees programme is, therefore, part of Smallwood's commitment to exploring new ways to help bring diversity, equity, and inclusion into all of its work to support its goal of ending gendered poverty. It was not designed as a pipeline to attract future Trustees for Smallwood Trust's Board, or indeed elsewhere even though it did do this.

Rather, this was seen as an opportunity to open up space on the Board of a funder operating at national level, to give valuable insights for women working at grassroots level into what being a Board member in the sector entails and to give Shadowees new skills, exposure and experience.

"By opening the doors and exposing what goes on around the board table and making these seemingly 'not for me' spaces more accessible, we can slowly change the lack of current diversity in the governance space." Dr. Ambreen Shah, Trustee, Smallwood Trust



Scaling the Model

There is much talk within the sector about wanting to include people with lived experiences in the decision-making process. The Board Shadowing Programme is not a blueprint, simply good practice. It is a flexible model which should be informed by individuals' needs, the culture of your organisation and your Board.

Core ingredients for a successful Board Shadowing Programme are:

Relational + Role model + Representation

A Recipe for Success

Relational: Building a trusted relationship and keeping communication channels open, particularly before & after Board meetings is key.

Role model: Do you have a role model within or linked to your Board that Shadowees could learn from by example?

Representation: Do you have somebody on your existing Board of Trustees that Shadowees will identify with?

Without any one of these ingredients, the programme risks becoming transactional.

Getting Started

Running such an initiative is not resource-intensive since there is a distinction between Board member shadowing (which runs for a defined period of time and with clear contact points), mentoring (which tends to be for 12 months+, involving a deeper relationship, and assigning goals). The design of the programme was not overengineered and, overall, this flexibility was helpful. The organisation did not wait to put a strategy in place but rather decided to just start and learn and adapt as time went on.

However, it does require commitment at both Board and Senior Leadership levels and should be central to your mission. Here, we explore the learning, insights, new perspectives, and access to different networks for the Smallwood Trust Board and Shadowees alike.

If you just want to get started, Dr. Ambreen Shah has helpfully produced Ten Top Tips guide for those organisations interested in developing their own Board Shadowing Programme.

Download the [guide](#).

Recruitment

A description of the role and responsibilities of a Shadowee was drafted and simple selection criteria were formulated. Recruitment to the programme was not focused on protected characteristics. The shadowing opportunity was circulated via a call-out, an advertisement on the website, LinkedIn, and wider networks. Nominations (with the prior agreement of nominees) from women's sector organisations were also accepted.

Those interested were asked to email one of the Trust's newer Board members Dr. Ambreen Shah or CEO Paul Carbury, explaining their motivation for being interested in the opportunity and what they would hope to learn from the programme.

Sixteen people responded, including one man. A cohort of three women with lived experience was subsequently invited to shadow Dr. Ambreen Shah. A cohort model worked well, with 2-3 Shadowees also benefiting from peer learning and support. The number of Shadowees could be higher, proportional to the size of your Board and your ability to provide the right support.

Onboarding

Preparation for the meetings involved Board papers being sent by the CEO, followed by a pre-meeting with the lead Trustee where the papers were discussed and the Shadowees could ask questions to gain clarification on any matters they were unfamiliar with.

Meetings

Meetings were prepared for in advance and the Board was reminded to avoid jargon and acronyms during the discussions. Shadowees were present as observers. Each Shadowee was offered the opportunity to arrange a 1-2-1 chat with individual Trustees.

Shadowees would have preferred more face-to face-meetings, if possible. This was not down to language, more about forming connections and being able to arrive feeling mentally prepared. However, requiring participants to attend face-to-face meetings in London could be restrictive by presenting a set of challenges such as taking leave, childcare, etc, particularly for Shadowees living outside the area.

"By being included in this process, I feel more confident about bringing my own experience, my lived experience and my work experience to another organisation." Ciiku Sondergaard, Shadowee



The Opportunities

The key elements for Shadowees on the programme were:

- Attendance at Board meetings and sub-committee meetings
- Optional pre-meetings and de-briefings with lead Trustee and CEO before and after each Board meeting (including optional monthly check-ins with lead Trustee)
- Opportunities to learn about the grant-making process and visit funded organisations (in-person or remotely)
- Optional attendance at external events (e.g. report launches/webinars etc)
- Optional participation in Grants Panels

Intersectionality & Accessibility

Taking intersectionality into account is a vital consideration for any organisation setting up such a programme. The three Shadowees were at different stages of career and personal journeys but still had commonality in the life issues they had experienced (domestic abuse).

The ability to participate, however, is not just based on their lived experience of financial hardship. Health, immigration status, childcare, and other life issues impact the ability to show up fully. Accessibility needs were addressed by sending paperwork in advance but since these were presented in a text-based format, it was felt the pre-meetings were most helpful in bringing the issues to be discussed at the Board meeting to life.

"Smallwood knew that they had three women with three different lived experiences at three different stages, so they made sure that any of our needs were catered for. I think this is 'best practice' and really needed particularly for anyone who is thinking of introducing lived experience on their Board." Shana Begum, Shadowee



On Completion

The programme lasted for one year. The original intention was to have two cohorts (six months each). Due to a potential Shadowee having to withdraw prior to programme start, a decision was taken to merge the two cohorts.

Participants were not actively seeking trusteeships and while one was already serving on Boards, this experience was outside of the charitable sector - she felt this experience restored her faith in Boards and demonstrated tangible best practices.

Shadowees also questioned their own unconscious biases about the makeup of a Board in terms of Trustees' personal characteristics, behaviour, and that not only do black and brown Trustees have agency on Boards but that their challenge and diverse perspectives are welcomed. While the intention was not to recruit aspiring trustees, two have since joined other non-profit Boards.

"It's not an exaggeration to say it was life-changing."

Saira Shahzadi, Shadowee



Shadowees

What worked:

- Experience of a Board operating at national level
- Insights into funding and grantmaking through experience of the decision-making process and robust processes for allocating funding
- New networks
- Broader personal development
- Sense of purpose/positive focus
- Understanding of how an ethical organisation works, and broader charitable sector
- Appreciation of the importance of having a variety of skills on a Board, and diversity in its broadest sense

Smallwood Trust

What Worked:

- Goes to the core of Smallwood Trust's mission
- Gives beneficiaries a voice empowers and brings diversity of viewpoints
- Provides access to different networks and opportunities, which are components to support individuals' financial resilience
- External recognition of the Shadowing Programme – trust and relationships developed

What Smallwood Trust would do next time

- Include criteria in a drop-down menu (i.e. checking 'experience of poverty' where relevant) to avoid people interested in the role having to relate their lived experience and disclose difficult accounts of poverty or trauma when expressing their interest.
- Include a question about accessibility needs
- Hold an informal networking session with Board members prior to the first meeting to build relationships, confidence, and understanding.
- Include a short, optional section on the Board meeting agenda for Shadowees to speak or ask questions, agreed in advance with the Trustee that they are shadowing. Structuring the Board agenda to support any possible issues around conflict of interest or confidentiality. As observers, they would take their leave prior to Reserved Matters or other sections for Board only conversations.
- Automatically offer a set amount to cover out of pocket expenses - not everyone is willing to submit an expense form, especially if others are not doing so.
- Consider remuneration in some form. Work and other challenges such as having to take a day's leave to attend can get in the way.
- Hold individual development needs conversations – a £500 bursary per Shadowee was allocated but not all of this was taken up – a skills development conversation at some point during the programme may encourage them to use the bursary.

External Recognition

The Board Shadowing Programme has gained attention within the sector, building Smallwood Trust's profile and credibility with peers, and relationships with grassroots organisations, so transparency throughout - by sharing the learning and achievements as we went along - was important.

Publicity/promotion of the initiative by organisations such as Getting on Board, ATRD, The Centre for Charity Effectiveness (which showcased the programme as a case study), Prospectus and the Young Trustee Movement (hosted a webinar), as well as various CVS organisations.

Publicity

- Opportunity to shadow Smallwood Board member | Smallwood Trust
- Meet the Smallwood Board member shadowees | Smallwood Trust
- Reflecting on our Inaugural Board Shadowee Experience | Smallwood Trust
- Lived experience: Overcoming the barriers | Bayes Business School (city.ac.uk)
- Board Shadowing Webinar: What it is, how it benefits charities and getting involved

Ten Top Tips

Download our **guide** to create your own Board Shadowing Programme.



Contact us

Visit our **website**: www.smallwoodtrust.org.uk

Email us: info@smallwoodtrust.org.uk

Follow us on **Twitter**: [@SmallwoodTrust](https://twitter.com/SmallwoodTrust)

