

Board Shadowing programme Year Two Evaluation

By Anj Handa, Inspiring Women Changemakers

Background

Smallwood Trust's purpose is to enable women on low incomes to become financially resilient. It seeks to increase diversity in its governance by hearing the widest range of voices around the Board table.

Smallwood Trust is committed to grounding learning and improvement in shifting power in its own practices, and wanted to do something practical to demonstrate how lived experience expertise is valued just as much as expertise drawn from learned and practice experience. So, in 2021, Smallwood Trust launched its Board Shadowing Programme.

The programme is a 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. In this evaluation of year two, we explore the learning, insights, new perspectives and access to different networks for the Smallwood Trust Board and Shadowees alike.

The shadowees, three members of the Board and the Chief Executive were all interviewed for this evaluation:

Key Elements of the Board Shadowing Programme

The design of the programme was not overengineered and overall, this flexibility was helpful. The key elements for Shadowees on the programme were:

- Attendance at Smallwood Board meetings and sub-committees
- Pre-meetings and de-briefings with a nominated lead Board member and the Chief Executive before and after each Board meeting
- WhatsApp group for each cohort, and for both cohorts combined to share experiences and information, reminders about upcoming meetings and relevant opportunities.
- Opportunities to learn about the grant-making process and visit (in-person or remotely) funded organisations
- Optional attendance at external events (e.g. Report launches/webinars etc)
- Optional participation on Grants Panels



What Worked - Shadowees

“ It’s like having a backstage pass to your favourite concert!
Nikki Iyayi, Shadowee ”

Shadowees gained a realistic perspective of how the Board of a funder operates: by bringing in different, informed viewpoints, asking insightful questions, analysing complex issues and considering income generation, including investments.

One Shadowee reported that the most valuable aspect of the programme was how she felt not only accepted but included and that her opinion matters, offering validation and helping to rebuild her confidence after a difficult life chapter.

They said that pre- and de-briefs with the lead Board member were useful in helping them get to grips with the papers. She regularly checked in and shared opportunities within the WhatsApp group. All appreciated the flexibility of the programme.

One of the participants had been actively seeking a trusteeship prior to joining the programme and related that her experience of the Board shadowing Programme has clarified to them that they wish to join the board of a funder rather than a charity.

While some Shadowees initially had reservations about the term ‘lived experience’ as they did not want to have to share their personal experiences and relive trauma, these concerns were quickly allayed. They felt they were treated as peers by the Smallwood Trust Board.

“ If others got to see how much Smallwood Trust cares, it would be a light at the end of the tunnel for them...There was a genuine desire [of trustees] to learn – nobody was pandering to tokenism.
Rachel Brown, Shadowee ”

What Worked – Smallwood Trust

“ One of the main benefits for Smallwood has been that the programme has enabled us to demonstrate a real commitment to enabling and promoting lived experience in the boardroom and decision-making process. This has been helpful to our collaborations and work with external stakeholders.
Paul Carbury, CEO ”

The Board Shadowing Programme goes to the core of Smallwood Trust’s mission. One of the ways Shadowees were empowered to contribute their viewpoints was through the Grants Panel process.



As the Smallwood Chair acknowledged, this process not only gave Shadowees an opportunity to influence, it meant that Smallwood Trust did not have to recruit more widely and train up women working at grassroots level, thus freeing up capacity and ensuring quality as Shadowees already had an insight into the way the Smallwood Trust team and Board makes funding decisions.

Additionally, it provides access to different networks and opportunities, which are components to support individuals' financial resilience. One Shadowee reported that 121 coaching by Smallwood Trust's external HR consultant had directly helped with her job search (all Shadowees had been offered up to four 121 sessions).

Another reported that by observing an external leadership consultant's facilitation style, she had brought a more fun approach into giving presentations in her new job. One is being mentored by a leader from one of Smallwood Trust's Community Grant Partners.

“ There can be power imbalances on Boards, which create hesitation in speaking up. In-person meetings quash the notion of hierarchy and show that we are all human.

Faeza Vaid, Smallwood Board Member

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Learnings

Recruitment

As with year one, a description of the role and responsibilities of a Shadowee was drafted and simple selection criteria were formulated. Recruitment to the programme was not focussed 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 Smallwood's Board member responsible for overseeing the programme and the Chief Executive, explaining their motivation for being interested in the opportunity and what they would hope to learn from the programme.

23 people responded to the call. A cohort of four women with lived experience were subsequently invited to join the programme. Changes to the recruitment process had been made in line with recommendations made in the **year one evaluation** and all of the Shadowees stated that the process was straightforward and inclusive from the outset.

Motivations for Shadowees joining the programme could include gaining:

- experience of a Board operating at national level
- insights into funding and grantmaking
- new networks
- understanding of the charitable sector
- broader personal development
- sense of purpose/positive focus



Onboarding

Preparation for the meetings involved Board papers being sent by the Chief Executive, followed by a pre meeting with the Lead Board member where the papers were discussed and the Shadowees could ask questions to gain clarification on any matters they were unfamiliar with. Shadowees reported that the notes did not make much sense but they had anticipated this, with one saying “We didn’t know what we didn’t know.”

Taking intersectionality into account is a vital consideration for any organisation setting up such a programme. All four Shadowees come from different backgrounds and were at different stages in their careers but found they could relate to each others’ experiences and found the group aspect valuable.

Meetings

Meetings were held in person once, and subsequently on Zoom. These were prepared for in advance and the Board was reminded to avoid jargon and acronyms during the discussions. This year, Shadowees were given the opportunity to participate and not just attend as observers. This comes as a result of the Chair’s and Trustees’ increased confidence in inviting Shadowees’ contributions and acknowledging the richness that their perspectives bring to Board discussions.

Each was offered the opportunity to arrange a 121 chat with individual Trustees but this was not taken up and in year three, this will be actively encouraged.

Shadowees would have preferred more face-to face-meetings, if possible. The three who attended the Away Day and dinner in London found the experience enabled them to get to know Trustees on a personal level and felt they were better able to contribute at future meetings because of this.

However, requiring participants to attend face to face meetings in London continues to be restrictive by presenting a set of challenges such as taking leave, childcare etc, particularly for Shadowees living outside the area.

Programme Duration

The programme was extended by a further three months (initially Oct 2022-Sept 2023, now ends Dec 2023), a development which Shadowees felt positively about.

Profile and Sector Recognition

The Board Shadowing Programme gained attention within the sector, building Smallwood Trust’s profile and credibility with peers, and relationships with grassroots organisations, so transparency throughout is important.

In 2023, the programme was featured in Governance magazine and was highlighted through various sector forums and grant-making collaborations, including with external funders.



Recommendations

The following recommendations are made for the continuation of the programme in year three:

- 1.** To continue to run the Board Shadowing Programme as a core aspect of Smallwood Trust's mission through embedding it into the EDI strategy to safeguard continuity
- 2.** Each cohort to comprise of four Shadowees.
- 3.** Paul Carbury (Chief Executive) and Dr Ambreen Shah (Lead Board Member) to continue leading the programme. All trustees having the opportunity to have a 121 with each Shadowee at least once in the year
- 4.** Each cohort to attend at least one Strategy Day and two Board meetings (duration approx. 12 months), one Grants Panel (where possible) and one annual review meeting with the Chief Executive, Lead Board Member and Chair of the Board.
- 5.** Year three of the programme to commence recruitment in January 2024.
- 6.** To continue offering payment to prepare for and attend Board meetings (and travel or other out of pocket expenses at an appropriate amount automatically), and to attend any other relevant meetings.
- 7.** Continue to offer the flexible bursary of £500 for personal development i.e. it is not necessarily linked to development around governance.
- 8.** Kick off the programme with a Strategy Day so that Shadowees get to network with Trustees in person in a different setting. Provide an opportunity to dine together in an accessible venue that removes barriers to participation (potential barriers could include location, access to the building, alcohol, overly noisy/bright spaces).
- 9.** Guarantee interviews (but not the role) for any Shadowee wishing to apply for a Trustee role when vacancies arise.
- 10.** Executive team to work towards an engagement plan to partner with other funders to broaden the programme from year four and increase the number of Shadowees.
- 11.** Change wording on the Shadowee recruitment advertisement from 'observe' to 'participate.'

