

Trustee Gym

**A New Concept in Board Training
From
Richmond CVS**



Trustee Gym

Calling All Trustees!

- ❖ Want to develop your board, but can't find the time or money for courses on every topic you would like?
- ❖ Want to liven up your board meetings and get more discussion going?
- ❖ Want a break during your next trustee meeting?

Why not combine all three by dipping into the **Trustee Gym**?

RCVS' Performance Improvement Team has developed the Gym in response to trustees telling us they want to develop their boards, but can't afford the time and money for full-length courses on everything they need to know to govern their organisations:

"People are interested in training, but they just can't find more time on top of what they already give"

"Some of the courses are so expensive – it's OK for the big charities, but it's too much for us"

"It's hard enough to get everyone together for a board meeting, let alone to agree another time everyone can commit to for training"

The Gym consists of a 'menu' of over 30 bite size 'workouts' - short, low cost, convenient sessions, 20 - 45 minutes long **designed to fit into board meetings** – and intended to revitalise, inform, develop, get creative juices flowing, challenge, open debate and enliven.

How It Works

Just **choose what you want from the list**, with help from the adviser if you wish, then the **adviser comes to your board meeting** during the **day or evening** (subject to availability) with **all the necessary materials** and delivers the session as **part of your meeting**.

You can **mix and match sessions** to meet your own organisation's needs:

- ❖ Want something a little longer?
Combine two or three short sessions to make up an hour or so.
- ❖ Don't see what you need?
Give us a call and we may be able to develop a new session to add to the list.
- ❖ Not sure which workout is right for your organisation?
Contact us and talk it through with an adviser with no obligation.

Although we obviously can't cover the same ground as a full-length course, all the workouts have direct practical applications or outcomes, which will make a difference to your organisation and importantly, all the sessions are designed to invigorate the board as a team and to be fun.

"Thank you so much for the session you ran today. Everyone enjoyed it, found it useful and there was such a buzz afterwards. Normally, the trustees are quite keen to finish meetings within the allotted time, but today I couldn't stop the discussions and ideas and had to throw them out!"

Sue Ball, Chair of Richmond AID

Just £10 per session or buy 2 get one free if they all take place at the same time!

Workout Menu

SECTION 1: GOVERNANCE (Delivered by Simon Croft)

Title: G1. Leadership or Management?

Content: Two teams use post-its and case studies to develop their thoughts on leadership and management and how they see their board's role.

Purpose: Helps clarify the boundary between board and staff roles as a basis for a clear, positive board/staff relationship.

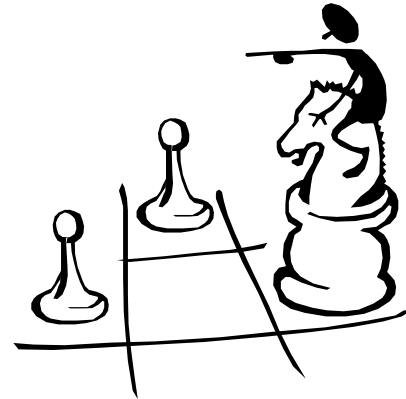
Choose if: You are about to employ your first senior staff member

Your organisation is growing or changing and the boundary between board and staff roles needs to change

There is friction between board and staff because roles are unclear or because the boundaries of roles are not respected

Duration: 40 mins

See also: G22, G23



Title: G2. Stuck in a Rut?

Content: A lighthearted team-based exercise that asks you to draw on your imagination to connect two unlikely events and show how past habits can affect your future.

Purpose: To help a board to think beyond 'we've always done it this way'
To identify blocks and boosts to your creativity

Choose if: Your board struggles to think creatively

People don't express new ideas for fear of being thought silly

You struggle to see how to reach the new by building on the old.

Duration: 30 mins

See also: G3, G6, G19

Title: G3. Join the Dots

Content: Three connected puzzle-based creativity exercises that get you thinking outside the box

Purpose: To encourage innovative thinking by the board
To encourage a 'How can we...' approach
To identify blocks and boosts to your creativity

Choose if: Your board struggles to think creatively

People don't express new ideas for fear they won't be thought good enough

Your board has supported less than two new ideas in the last two years

Duration: 20 mins

See also: G2, G6, G19

Title: **G4. 20 Questions on Governance**

Content: A quiz to check your knowledge on 20 points of governance most vulnerable to assumption and misinformation (unincorporated organisations only)

Purpose: To remind or inform the board about common, but easily avoided pitfalls
To help you spot any areas where you might need to update your practice.

Choose if: Your board hasn't thought about governance in a while
Your board wants to check or refresh its governance knowledge

Duration: 30 mins

See also: G7, G13, F2

'What is Governance?' – a 3hr evening course from the RCVS Governance and Planning Adviser which gives a complete introduction to governance.

Title: **G5. Effective Meetings**

Content: A questionnaire to help you look at how your meetings run, then tools and tips to build into an action plan to keep your meetings on track

Purpose: To identify what's helping and what's hindering your meetings
To inform about common good meeting practice
To help your organisation have more productive meetings

Choose if: Your board meetings always start late and/or run over time
Your meetings get bogged down easily
Nothing seems to get decided or moved forward at your meetings

Duration: 40 mins

See also: G18

Title: **G6. Opportunity Blocks**

Content: A short, humorous quiz about infamous quotations, followed by a review of why opportunities are sometimes missed.

Purpose: To identify 'opportunity blockers' and create ways to avoid them.

Choose if: New ideas don't often get fully explored in your organisation
There seem to be more threats than opportunities for your organisation

Duration: 25 mins

See also: G2, G3, G19

Title: **G7. What's in Our Governing Document?**

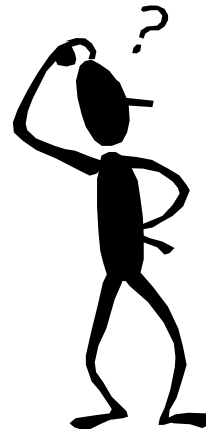
Content: A quiz tailored to your particular governing document

Purpose: To remind your board about key elements contained in your governing document and what it does and doesn't allow you to do
To check out it's still relevant for your organisation today

Choose if: Your board hasn't looked at your governing document for a long time
You have new board members – to introduce the document

Duration: 20 mins

See also: G4, G13



Title: **G8. Our House**

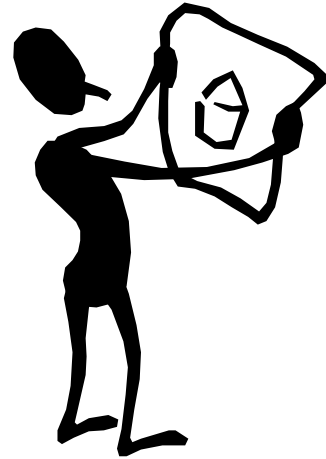
Content: 2 or 3 teams look to the future of the organisation in this simple, engaging drawing exercise (no drawing skills needed!)

Purpose: To consider where your organisation is now and where you would like it to be in 3 or 5 years time

Choose if: Your organisation seems to be stuck in a rut
Only a few members of your board get involved in deciding the future
There's little or no consensus about where your organisation should be headed

Duration: 40 mins

See also: G9, G11, G17



Title: **G9. Mini SWOT**

Content: Looking at Strengths Weaknesses Opportunities and Threats in relation to all or part of your organisation or a key decision

Purpose: To provide a basis for decision making on important matters

Choose if: There is a particular decision the board needs to get to grips with
You haven't reviewed your organisation for some time

Duration: 40 mins

See also: G5, G8, G11

Title: **G10. Skills Audit**

Content: The chance to customise and complete a skills audit for your trustees. The advisor will take the completed forms away and summarise them.

Purpose: To enable the board to see where it needs to increase its skills
To inform succession planning and recruitment to the board

Choose if: You want to check you have all the main skills covered
You want to recruit new people to the board – to find out what to recruit for
You have several new people on the board – to find out what you have

Duration: 25 mins

See also: G12, G20

Title: **G11. Introduction to Planning**

Content: A puzzle which gives a brief overview of the processes involved in organisational planning, the usual content of a written plan and the benefits of planning.

An introduction to RCVS' extensive planning support materials on its website

Purpose: To inform your board about what planning entails

To enable your board to decide whether to plan

To enable your board to use the RCVS web materials successfully

Choose if: You are uncertain whether planning is right for your organisation
You need to begin planning but don't know where to start

Duration: 45 mins

See also: G8, G9, G21, F4

Title: G12. Introduction to the National Occupational Standards for Trustees

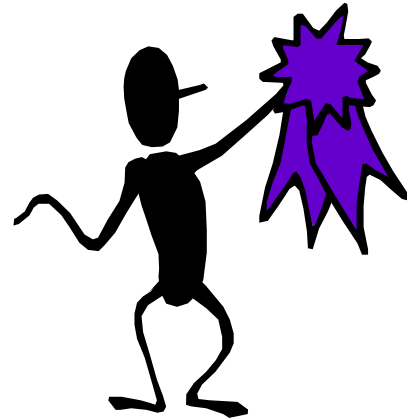
Content: A brief overview of what the 'NOS' is and what it contains.

Purpose: To introduce the concept of 'NOS's – what they are and aren't
To enable you to see how they might be useful for your board

Choose if: You want a way to ensure new trustees know what will be expected of them
You want to set a good practice benchmark for your board

Duration: 25 mins

See also: G10, G20, G26



Title: G13. Introduction to the Code of Governance

Content: A brief overview of the Code of Governance published by the Governance Hub – what it is and what it contains.

Purpose: To introduce the concept of the Code – what it is and isn't
To enable you to see how it might be useful for your board

Choose if: You want a good practice standard for governing your organisation
You want to assess your organisation's governance

Duration: 30 mins

See also: G4, G7, F1, F2

Title: G14. Introduction to Incorporation

Content: A true/false quiz about the advantages and disadvantages of incorporation
Information on the new forms of incorporated organisation becoming available.

Purpose: To help you decide whether your organisational structure is still right for you and inform you of potential options

Choose if: You are uncertain what incorporation is or whether you might need it

Duration: 25 mins

See also: G15, G16

Note: This session is not a substitute for proper legal advice

Title: G15. Liability

Content: A video based case study about your liabilities as trustees and how to mitigate them.

Purpose: To clarify the liabilities trustees face and how they differ in different kinds of structure
To put trustee liabilities into perspective
To outline steps to take to reduce them.

Choose if: Your board doesn't know what its liabilities are
Your board is worried about liabilities

Duration: 45 mins

See also: G14, G16, F2



Title: **G16. Introduction to Risk**

Content: Tools and tips on looking at risk, working out which risks matter and dealing with them; case studies to try the tools out on
(Note this is general risk, *not* Health and Safety risk)

Purpose: To introduce trustees to risk management
To help trustees to secure the future of their organisation

Choose if: You need to assess risk in your organisation but are unsure where to start

Duration: 40 mins

See also: G14, G15, F2

Title: **G17. Valuing our Values**

Content: An exercise with pennies, done in pairs or threes, tailored to your organisation's key values.

Purpose: To clarify your organisation's values

Choose if: Your board is unclear what it values most
Values are important to your organisation, but you don't discuss them.

Duration: 25 mins

See also: G8

Title: **G18. Can You Tell What It Is Yet?**

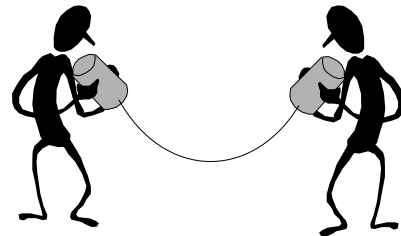
Content: Teamwork is needed to complete this lighthearted communication task involving describing and drawing

Purpose: To find out about people's different communication strengths and build the board as a team

Choose if: Communication needs to be improved in your organisation
There are several new board members to welcome to the team

Duration: 30 mins

See also: G5



Title: **G19. Innovators All! (The Polo Game)**

Content: A fun exercise to break down the barriers which block innovation

Purpose: To revitalise creativity

Choose if: Your board struggles to think creatively
People don't express new ideas for fear of being thought silly

Duration: 20 mins

See also: G2, G3, G6, G19

Title: **G20. Wish You Were Here?**

Content: Sketching out a 'postcard' to attract new board members

Purpose: To help you work out what you want from new board members, what you offer them and what potential recruits see.

Choose if: You are struggling to find new board recruits

Duration: 30 mins

See also: G10, G12, G25, G26, G27

Title: **G21. Making an Exit**

Content: Are you hanging on too long to a project that's past its sell by date?
A look at the psychology of exit decisions.

Purpose: To provide your board with the tools to decide when is the right time to exit from projects.

Choose if: You have a project that is declining or not covering its costs

Duration: 20 mins

See also: G11, F4

Title: **G22. If the Hat Fits...**

Content: People in small organisations often have to wear more than one 'hat' to keep their organisation running – trustee, volunteer, fundraiser - but this can cause confusion, especially as the organisation starts to grow. A brief exercise looking at what jobs fit where in your organisation.

Purpose: To help you clarify what jobs fit where in your organisation

Choose if: Your organisation is growing and roles are changing
There has been some conflict over role boundaries

Duration: 25 mins

See also: G1, G23

Title: **G23. On Track**

Content: A fun drawing exercise in which different organisational roles are drawn as parts of a train. Who is driving *your* train?

Purpose: Clarifying the overall role of the board in your organisation

Choose if: Roles are unclear
There is conflict over roles or role boundaries

Duration: 35 mins

See also: G1, G22, G24

Title: **G24. Stakeholders in the Picture**

Content: Drawing a 'family tree' of your organisation and everyone who has an interest in it.

Purpose: To identify your organisation's stakeholders and how you communicate with them to help spot areas for improvement.

Choose if: You are unclear who your stakeholders are
You want to make sure you involve your stakeholders effectively

Duration: 30 mins

See also: G23



Title: **G25. Welcome Mat**

Content: What did you wish you'd known when you joined your organisation?
An exercise with post its and 'clip art'

Purpose: Reflecting on the positives and negatives of your own experiences of being a new trustee and finding ways to improve it for others.

Choose if: You are struggling to keep new trustees
You want new trustees to feel comfortable and welcome as early as possible

Duration: 20 mins

See also: G12, G20, G26, G27

Title: **G26. Induction**

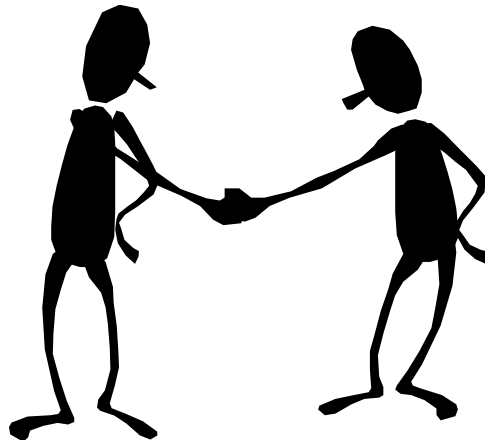
Content: Thinking about creating an induction pack?
A short session to build a list of contents as a starting point, with ideas and directions to free resources for it.

Purpose: To help your organisation tailor an induction pack for new trustees

Choose if: You expect new people on board soon
You want to make sure every current board member knows certain key things about your organisation

Duration: 25 mins

See also: G12, G20, G25



Title: **G27. What a Bind!**

Content: Looking at a selection of Annual Reports and drawing up a list of what you would like to see in your own Report
Tips on how to make Annual Reports work for you

Purpose: To enable your organisation to develop ideas for its own annual report.

Choose if: You would like your report to support your funding applications better
You would like your report to attract potential volunteers

Duration: 30 mins

See also: G24

SECTION 2: FINANCE (Delivered by Julie Woodhouse)

Title: F1. Why bother with Cash flow?

Content: An introduction to why cash flow is important, both in the context of being an ongoing concern, reserves & investment opportunities

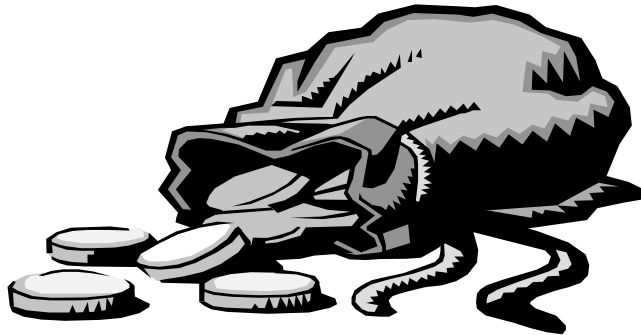
Purpose: To ensure solvency and that you have your financial finger on the pulse

Choose if: Your organisation does not use a cash flow forecast ,or you need a refresher.

Duration: 20 mins

See also: F2

½ day participatory cash flow course



Title: F2. Understanding the Management Accounts

Content: A brief guide to what the monthly accounts should mean to you as a trustee

Purpose: To de jargonise some financial language, so that trustees can use the information to plan

Choose if: As a trustee you would like further financial training to increase your involvement in decision making

Duration: 30 minutes

See also: F1

One day course 'Finance Reports for Management Committees'

Title: F3. What is the balance sheet?

Content: A quick outline on what represents a balance sheet

Purpose: To demystify the balance sheet

Choose if: You want to gain greater financial awareness & will lead to understanding the annual accounts

Duration: 30 mins

See also: F2

½ Day course-'Understanding the Balance Sheet'

Title: **F4. What is Full Cost Recovery?**

Content: A brief overview of direct & indirect costs & allocation of overheads & drivers.

Purpose: To act as an introduction as to this ever increasing in importance topic with funders

Choose if: Your role involves making bids to funders

Duration: 25 mins

See also: 1 day course on Full Cost recovery



Title: **F5. Restricted or unrestricted?**

Content: Understanding the difference between these two terms and what funders expect in terms of reporting, back up evidence & variations in budgets

Purpose: To understand funders requirements

Choose if: You have several funders, are new to your role or just need a refresher

Duration: 30 mins

See also: Do's & Don't s of planning applications

Title: **F6. An Introduction to Finance for Trustees**

Content: Key areas of finance to have knowledge about, covering audit, independent examination, financial skill sets, restricted v unrestricted funds, understanding your income, signposting & where to get advice.

Purpose: To give a general overview of finance.

Choose if: You are a new trustee or simply want to make sure your skills are up to date

Duration: 30 mins

See also: G4, G10, G12, G26

Further Information and Booking

To enquire about the Trustee Gym, to discuss your requirements or to book, contact:

Simon Croft

T: 020 8255 8195 (9:00-5:30, Mon, Tues, Thurs)

E: simonc@richmondcvcs.org.uk

Julie Woodhouse

T: 020 8255 8509 (10:00-5:00, Mon, Thurs, Fri)

E: juliew@richmondcvcs.org.uk

Interested?

Develop your gym programme here!

G1		G19	
G2		G20	
G3		G21	
G4		G22	
G5		G23	
G6		G24	
G7		G25	
G8		G26	
G9		G27	
G10			
G11		F1	
G12		F2	
G13		F3	
G14		F4	
G15		F5	
G16		F6	
G17			
G18			



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