

BARRIERS AND ENABLERS TO BOARD DIVERSITY IN THE HERITAGE SECTOR

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USUAL SUSPECTS
DEPRESSING
COULD DO BETTER
STALE
SHOCKINGLY AWFUL
POWER
BARRIER TO ENTRY
WHITE
UNSUSTAINABLE
FEAR
OPEN TO CHANGE
NARROW
PALE
HORDING SENIOR
SMALL PROGRESS
ESTABLISHMENT
GLOBAL
MINORITY
COMPLEX
HOPEFUL
OPPORTUNITY
INNOVATION
HOMOGENEOUS
NOT GOOD ENOUGH
INEQUALITY
HESITANT
SOME ASPECTS
REASONABLE
IMPROVING | RIGOROUS | POOR
UNREPRESENTATIVE
LACK RELEVANT
EXPERIENCE | ELITIST
CLASS

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FOREWORD FROM HISTORIC ENGLAND



Historic England is committed to addressing the barriers to board diversity identified in this report.



Heritage is for everyone. At Historic England, we believe that the historic environment in England should be accessible and relevant to everyone who lives and visits here, whatever their socioeconomic background, race, religion, age, sexuality, gender, disability or health.

Our first Strategy for Inclusion, Diversity and Equality 2020–2023 set out our ambitions to improve the diversity of our own workforce, and to make the work we do more inclusive. We also began work to help shape and influence a more diverse and inclusive sector.

We recognise that the historic environment sector still has a long way to go for its workforce and leadership to be fully representative of the rich diversity of the country. This lack of representation is especially apparent amongst the decision makers of the sector, including boards.

We believe there are many benefits to having diverse boards. A diversity of lived experience brings with it a diversity of views, ideas and insights. As Getting on Board has said, ‘board diversity is key to effective decision-making’, and can shape a stronger sector and a more equitable society.

Historic England is committed to addressing the barriers to board diversity identified in this report. We welcome the recommendations, which provide a solid framework to begin this work. We would like to join Getting on Board in thanking those who gave their time to share their experiences to help create a fuller picture of the challenges, and the opportunities for building more diverse and inclusive boards.

**Historic England
September 2023**



INTRODUCTION



In the wider charity sector, only one third of trustees (charity board members) are under 50 years old; 36% are women and 8% are people of colour (compared with 14% of the population); and 59% of charities say that their boards do not reflect the communities they serve.



This report outlines the findings of a qualitative research study commissioned by Historic England in 2022 into the barriers to and enablers of greater board diversity in the heritage sector.

We would like to express our thanks to the people who gave us their time to be interviewed. This report is based on their experiences, expertise and perceptions. Much of the report is in their own words (quoted in *italics*).

The historic environment sector is not unique in having poor board diversity. In the wider charity sector, only one third of trustees (charity board members) are under 50 years old; 36% are women and 8% are people of colour (compared with 14% of the population); and 59% of charities say that their boards do not reflect the communities they serve.¹

However, where the historic environment sector is more unusual is in having a sector body in Historic England that is keen to improve board diversity. Historic England believes that heritage boards that are more representative of society will better reflect and serve the heritage sector and the historic environment.

We hope the findings of this research will underpin progress in board diversity in the historic environment sector.

**Getting on Board
September 2023**



SUMMARY OF FINDINGS

Barriers to board diversity in heritage organisations

	People don't know they could join a board		We don't know how to recruit diverse trustees
	Anxiety that we might get it wrong		Baggage that comes with equality, diversity and inclusion
	A fixed view of heritage		Lack of capacity or people in my organisation to work on board diversity
	Constitutions acting as barriers to change		Closed recruitment and fixed ideas about what a good board 'looks' like
	Perceptions of current boards		Misconception there is a small pool to draw new trustees from
	Practicalities that exclude people, such as meeting times and not paying travel expenses		Lack of data about current board make-up

¹ These statistics are taken from the [Taken on Trust](#) report published by the Charity Commission for England and Wales in 2017 and from [The looming crisis in charity trustee recruitment](#) published by Getting on Board in 2017.



SUMMARY OF FINDINGS

Enablers of board diversity in heritage organisations

	Increased awareness of systemic racism		Data on current board diversity (for individual organisations and the wider sector)
	Sector supported to access expertise, good practice and training in inclusive board recruitment		Access to training and expertise on inclusive governance
	Higher profile of lack of board diversity		Collaborating with others to influence this agenda
	Making governance more visible and appealing		Using grant making levers
	Increasing the pool by nurturing and growing a pipeline of potential trustees		Support to change constitutions

ABOUT THIS STUDY

Background

As part of Historic England's work to support the wider historic environment sector to become more diverse and inclusive, the organisation identified the need for greater diversity in governance roles.

Its [Strategy for Inclusion, Diversity and Equality](#) has a specific action in relation to board diversity:

Seek partnerships to create a development programme for aspiring Board members for heritage organisations from groups which are under-represented on boards.

This programme will include people with Black, Asian and Minority Ethnic heritage, young people, disabled people and people from lower socio-economic groups.

To support the above objective, Historic England commissioned [Getting on Board](#) (a small national charity that focuses solely on board diversity in charitable or social organisations) to help it:

1. Understand the barriers to diversifying boards in historic environment organisations.
2. Consider a range of options for increasing the diversity of boards.
3. Identify key partners.
4. Understand the cost and timescales that this work would need.

What is the historic environment sector?

The historic environment sector encompasses a diverse range of organisations. It includes organisations, in both the commercial and public sectors, covering archaeology, surveying, engineering, conservation, planning, industrial sites, heritage transport, architecture practices, gardens, archives and museums.

This enquiry focused on organisations working primarily in the heritage sector.



As part of Historic England's work to support the wider historic environment sector to become more diverse and inclusive, the organisation identified the need for greater diversity in governance roles.



Methodology for this study

This work was qualitative in nature. The findings are based on a combination of 23 one-to-one interviews and two focus groups with a range of stakeholders. In total, 36 people's views have informed this work.

Of the one-to-one interviews:

20

were with people from the heritage sector (including six members of the Historic England senior team).

3

were with people who are experts in board diversity or equality, diversity and inclusion.

There were two focus group discussions with:

7

people interested in the heritage sector, who are not currently trustees.

6

people currently serving as board members who sit on heritage or heritage-related boards.

The interviews and focus groups were conducted during May and June 2022.

For the focus groups, we were clear we wanted to bring together under-represented groups in governance in the heritage sector: in particular people with Black, Asian or other minority ethnic heritage, young people under 25, disabled people and/or people from lower socioeconomic groups. Although we were not looking specifically for people who identified as LGBTQI+, some people identified as such, so this has also been noted where declared.

The people in the focus groups identified as below.

LGBTQI+	Black, Asian or other minority ethnic heritage	Young person	Disabled person	Person from a lower socioeconomic group
3	7	6	5	3

In addition, a number of participants also identified as neuro-divergent.

We asked people to self-identify, taking into account the intersectional nature of their identity where this was disclosed to us. Therefore, the numbers above add up to more than the total number of people who participated (as some people identified with more than one identity).

In this report, the data gathered has been analysed in terms of the themes that emerged from the interviews and focus group discussions. Where possible, we have tried to use the words of the interviewees and focus group participants themselves. Because the number of interviews was small, no attempt has been made to quantify the data to indicate the strength of feeling. But where certain views were expressed a number of times by different people, this has been made clear.

This report was written by Dr Ambreen Shah, with support from Amelia Woods, who facilitated the focus groups, and Penny Wilson, CEO of Getting on Board.

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Terminology used in this report

EDI is used as the acronym for equality, diversity and inclusion.

Board member is used as shorthand for a member of the committee leading an organisation. In the heritage sector, most board members are charity trustees, but other structures exist, and the barriers to and enablers of board diversity are likely to be similar, regardless of organisational structure.



VIEWS ON THE MAKE-UP OF GOVERNANCE IN THE HERITAGE SECTOR



Interviewees felt that greater diversity and 'vibrancy' could be found in small heritage organisations, especially those that focused on 'people's heritage'



We found wide agreement that the heritage sector's governance structures need to better represent the population of the UK as it is today.

There was widespread acknowledgement among interviewees and focus group participants that currently the heritage sector is not diverse in its governance, workforce or reach – one person called it *'elitist'*.

Many observed that governance is heavily reliant on white middle-class retired volunteers, who are or have been quite senior in their careers, and who are older (60+) and wealthier than the average person. Some also felt that these people probably mixed in less diverse circles, were part of certain types of network, were perhaps privately educated and/or were *'people who have been in the sector for years and years, the same template'*. Others even felt there may be a geographic bias, with many trustees coming from the South East.

There was some recognition that this situation was more entrenched in the larger, more established organisations (even though *'they know they need to change'*), especially *'where the cultural arm is not the main focus of their work'*, and among those who were *'constrained by their funding and/or relationship to (funders)'*. Interviewees felt that greater diversity and *'vibrancy'* could be found in small heritage organisations, especially those that focused on *'people's heritage'*.



Overall, interviewees felt that the sector had made good progress in increasing the number of women in senior and board roles, where there had been a significant shift over the years, and to some degree on LGBTQI+ engagement.



Overall, interviewees felt that the sector had made good progress in increasing the number of women in senior and board roles, where there had been a significant shift over the years, and to some degree on LGBTQI+ engagement. They thought significant challenges remained with regard to disability, ethnicity and socioeconomic background. Many noted that young people were also under-represented.

For some people, this lack of diversity was systemic and built into the very fabric of how the heritage sector operates. They felt the infrastructure that supports heritage is built to promote a certain view of what is and is not considered to be heritage. To quote one interviewee: *'If what you value is collections and buildings, what you look for in governance is people with expertise in collections and buildings to the expense of expertise in the experience of the people we are seeking to service.'*

As one person noted, what is needed is a starting point that recognises (and even celebrates) that *'heritage is redefined every time someone is born'*.



WHY IS DIVERSITY OF VOICE AND EXPERIENCE ON HERITAGE BOARDS VITAL?

Interviewees gave various reasons for the importance of diversity of voice and experience on boards:

To deliver real change

'We can't make real change without different kinds of representation at board [level].'

There was also recognition that heritage can improve a community's life, giving people *'pride of place'* and an improved sense of wellbeing, and that it is vital that the broadest range of people should benefit. Without diversity at board level, delivering this is much more challenging.

Good governance

'Having different people makes you make better decisions. It helps you expose the blind spots.'

'The way they [diverse board members] talk about things is really different. The others have all been to fee-paying schools and work in business. The way they interact wakes everyone up. They listen and respond more thoughtfully.'

“

There was also recognition that heritage can improve a community's life, giving people 'pride of place' and an improved sense of wellbeing, and that it is vital that the broadest range of people should benefit.

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Better for business

'[It's] not just about fairness and equality, but outcomes that will improve people's lives and your results.'

'It enables you to talk more to your customers. If the board is representative of them, it helps you enter new markets.'

Better storytelling

'Our job is to tell stories about people. The more diverse the people, the more interesting those stories will be.'

'You cannot write good archaeological narrative if you don't reflect the society of today. This narrative is not about the past, it's about today. If we don't reflect the life we live in, we end up writing a very privileged narrative.'

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'Our job is to tell stories about people. The more diverse the people, the more interesting those stories will be.'

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BARRIERS TO BOARD DIVERSITY



While many interviewees noted that EDI was on people's and organisations' radars, a minority of people felt it was not really a priority.



This work identified a number of barriers. Some are generic, in that they could be considered to be barriers in any sector – lack of diversity in governance is still a major issue across the charitable, public and commercial sectors.

Some are more specific to the heritage sector, or play out in certain ways when experienced in the heritage sector.

Equality, diversity and inclusion is still not a priority

While many interviewees noted that EDI was on people's and organisations' radars, a minority of people felt it was not really a priority. As one interviewee noted:

Racial injustice, diversity and inclusion is still minoritised. It's not centred in everything the organisation does. We have an EDI officer who sits in HR, two rungs below the senior team, rather than sitting at the top table. EDI is perceived as something that will improve your organisation rather than something that transforms your organisation.

The interviewee went on to note: *'I have not seen any real shift in power [since the protests following the murder of George Floyd in the USA]. Money has moved to Black and Brown communities, organisations have explored their history. There has been a bit of a culture shift.'*

However, they felt that while this wider context has meant charities have faced greater scrutiny on, for example, the legacy of the transatlantic slave trade, some organisations' responses have been more performative – in the realms of attempting to *'news manage'* this scrutiny, rather than trying to make genuine changes.



Boards can be seen as a hurdle to be overcome rather than core to the organisation's governance. Boards can also be populated by members who have been 'recruited for prestige rather than diversity of thought'.



Lack of understanding of what a board is

Two issues emerged from the research on this theme. One was the perspective that organisations did not fully understand what the role of a board is. Boards can be seen as a hurdle to be overcome rather than core to the organisation's governance. Boards can also be populated by members who have been *'recruited for prestige rather than diversity of thought'*.

The other was potential board members' lack of understanding of board roles. Several interviewees noted there was a general lack of transparency about what a board is and does, and what is involved for potential future trustees. As one interviewee noted: *'As a staff member, I don't know what the board is and what they are discussing. How can I see myself there?'*

There was a perception that the weight of legal responsibilities and the time needed to be a trustee possibly outweighed the benefits of the role, in terms of what you get out of it in return. In general, it was felt – by aspiring trustees at least – that greater clarity on what the role is, and its responsibilities and expectations, would be very welcome.



FOCUS GROUP REPORT

From the potential trustees: Unclear and overwhelming responsibility

What we heard

No one had a clear understanding of what a trustee is or does. The focus group felt the legal responsibility would be a huge amount to take on without clarity about what was expected. They especially felt that being unpaid meant they wouldn't have time to do the responsibility justice.

Opportunities to explore

- Making trustee roles, responsibilities and expectations clearer across the sector
- Finding ways to reimburse trustees or ring-fence time for them to take on a role (e.g. if they work in the heritage sector, giving them paid time off to attend board meetings)



‘Can’t be what you can’t see’

A few interviewees remarked that if they looked at a current board and saw no diversity, this would stop them applying for a role. They commented that they didn’t want to be ‘*the first one/token one*’. Another interviewee noted:

Seeing an all-white board. I could not join a board like that. [They might] expect you to be ‘the voice of’ [my community]. If [the board you join is] more diverse, you’re not faced with that burden... If you can look at a board and it feels more or less representative then you are more likely to join. You are not the diversity hire.



FOCUS GROUP REPORT

From under-represented serving trustees: I’m not an expert in EDI or a tokenistic gesture

What we heard

Trustees were excited about breaking down barriers in the sector, and accessing historic and cultural spaces, and want to be part of increasing diversity of thought on boards. But they are not EDI professionals. They just happen to have lived experience, and felt uncomfortable that other board members looked to them to lead in how they should approach and work with diversity when this isn’t in their expertise. In the worst versions of this, people felt they’d been brought onto a board not to contribute, but to make it look diverse.

Opportunities to explore

- Creating a clear culture of shared responsibility for learning about and sharing diverse perspectives on the board
- Recruiting EDI expert trustees who do have the expertise to take leadership of diversity conversations

How board meetings are run

Here, interviewees mentioned practical barriers, including: inflexibility over when meetings happen (e.g. during the day when some people can’t take time off work to attend, or always in the evenings when caring responsibilities may make it hard); or the masses of reading that lands in your inbox the week before; and how there is little consideration of different learning styles or needs (especially if you are neuro-divergent). Interviewees noted that being expected to read the board papers, then come up with some clever, insightful comment or question on the day meant that the boardroom could be an ‘*intellectually intimidating environment*’.

However, a more significant barrier was the culture of the boardroom and how trustee behaviours made the space ‘*not safe*’. In relation to young people, one interviewee noted, ‘*young people are intimidated by being on boards. The environment is difficult to navigate, at worst hostile. They are not sure how they will be heard and whether their experience will be valued.*’ There was concern over having to navigate ‘*unwritten rules*’; and ‘*a sense that certain people are at the centre and others on the periphery*’.

This was backed up by the focus group made up of people interested in the heritage sector, but who were not trustees yet. Participants expressed doubts that boards would be welcoming environments in which their voices would be valued; and that boards would be accessible environments for anyone who was neuro-divergent, meaning they would not be able to participate fully. The worst-case scenario was that a board recognised the need to diversify and managed to recruit someone, but had given no consideration to how that person would be welcomed and heard.



Participants expressed doubts that boards would be welcoming environments in which their voices would be valued; and that boards would be accessible environments for anyone who was neuro-divergent, meaning they would not be able to participate fully.





FOCUS GROUP REPORT

From the potential trustees: Will I be able and welcomed to share my value?

What we heard

Participants expressed doubts that boards would be welcoming environments in which their voices would be valued; and, in particular, that boards would be accessible environments for neuro-divergent people – meaning they wouldn't be able to participate fully.

'People may reach out to people that look like me – but how will I be treated when I get there?'

Opportunities to explore

- Participants suggested introducing a *'vibe check'* – a chance to shadow and spend time with a board to understand its culture and accessibility before applying
- Changing application processes to support neuro-divergent applicants
- Being explicit about what processes a board uses to enable all voices to be heard – including those who are neuro-divergent



Interviewees noted that if you are less senior in your organisation, you will be less likely to be able to take time out of your working day to attend meetings.



Financial barriers to engagement

There was a strong thread in the interviews that if you want more diverse people to be trustees, then paying them for their time (more than just out-of-pocket expenses) is something that needs to be addressed. As one interviewee noted, *'For you to take on an unpaid role you have to be at a particular time of your career. This knocks out a lot [of people] based on gender, age and race.'*

Interviewees noted that if you are less senior in your organisation, you will be less likely to be able to take time out of your working day to attend meetings. One interviewee who worked full-time said she had to take annual leave to attend meetings. Another, who was a freelancer, said: *'I am self-employed. The time that I give is billable time.'* This was also an issue raised in the focus groups: *'The people ploughing in their time who can't afford to are being exploited. That has never been acknowledged.'*



FOCUS GROUP REPORT

From under-represented serving trustees: Time to serve is a privilege

What we heard

Making a meaningful contribution to trusteeship is a huge time commitment. Pay structures in the sector were felt to be unequal, meaning that those in less senior roles could not afford to volunteer their time as trustees – especially if they had work commitments when board meetings happened; and those who did volunteer (to bring more diverse perspectives to boards) felt they were being exploited.

'I wasn't able to be a trustee because I didn't have financial means for the 10–15 years before this. I haven't got any superpowers or different abilities now. I can just afford it.'

Opportunities to explore

- Participants suggested introducing remuneration in the form of means-tested bursaries or grants, and suggested funders might be able to influence this
- Participants suggested introducing tax breaks for trustees
- Making trustee roles, responsibilities and expectations clearer across the sector
- Finding ways to reimburse trustees or ring-fence time for them to take on a role
- Participants suggested exploring asynchronous or remote ways to contribute and feed into board conversations, so their roles could be balanced with work



Interviewees noted that the majority of organisations in the sector are small, with few staff.



Lack of organisational capacity

Interviewees noted that the majority of organisations in the sector are small, with few staff. In this context, there is not much capacity to think about board diversity, as the priority is to keep core functions going. While EDI is sometimes considered important, it is not talked about much. Even when organisations do want to address it, their staff do not have the time to dedicate to it.

One interviewee noted that their organisation had two six-month secondments from the civil service to work on the EDI agenda, but when the secondees left there was no one else to take the work forward. There can also be a lack of board backing to make it a priority. A few interviewees felt that although staff were keen to see better board diversity, boards could lag behind on pursuing this agenda.



Anxiety among organisational leaders that they will get it wrong

Quite a few interviewees noted that fear of getting it wrong was acting as a barrier to change. This included both *'awkwardness about not wanting to say the wrong thing'* and *'a fear of breaking the law on recruitment practices, if [you] stipulated you were looking for a Black woman, for example'*.

Interviewees felt this was a barrier that could and should be surmounted:

If those organisations had a financial misappropriation issue or safeguarding issue, they would find a way to do something about it, even if they had no/little skills. If you feel you have crisis in your organisation, you find a way to get help to address it and view it as an urgency.

For this person, sector leaders did not see EDI as an urgent issue that needed addressing.

Lack of skills to deliver board diversity

Interviewees from both large and small organisations felt that the perceived lack of skills to deliver on this agenda was a major barrier. Many expressed the opinion that the willingness and good intentions are there, but the confidence and skills to progress this thinking and work are lacking: *'EDI is part of our core strategy. There is organisational understanding, but they may not know what they need to deliver it'*.

Fear of change

Some interviewees felt existing boards feared change. They felt there were deep-rooted and incorrect stereotypes about under-represented groups playing out that stopped boards from genuinely wanting to diversify. Some of the misconceptions were about:

Young people

'People are scared of young people making decisions that are too radical'. Interviewees felt boards may opt for a 'safe young person' as organisations are scared of losing their funding.



Interviewees from both large and small organisations felt that the perceived lack of skills to deliver on this agenda was a major barrier.



Disabled people

'With disability there is an extra fear that it will be more expensive [to make adjustments to ensure accessibility] and more time-consuming.'

Ethnicity

Some interviewees noted that boards may wrongly feel that by prioritising ethnic diversity, they are compromising on getting the *'best-quality board member you can attract'*.

As one interviewee noted: *'if you bring in new voices you have to be willing to listen and change and a board needs to be in a place to acknowledge this, accept it and invite it, rather than be fearful of it'*.

'If you think about heritage, the values we ascribe to them [historic things] change and will change as we bring new people into the conversation. [New] people witness the trauma we no longer see in these places and buildings.'

Traditional opinions

A couple of interviewees thought that *'more traditional opinions'* in the sector were a barrier, especially as those who held these views were *'quite powerful in the sector'*. They felt the narrative around heritage is not inclusive of all communities and cultures.

'Most preserve the past for the future. But what about the present?'



Some interviewees noted that boards may wrongly feel that by prioritising ethnic diversity, they are compromising on getting the 'best-quality board member you can attract'.





It is still the case that the majority of trustee roles are not openly recruited (in Getting on Board's 2017 research, 90% of charities reported that they had recruited most of their current trustees through word of mouth and existing networks).



Exclusionary board recruitment practices

It is still the case that the majority of trustee roles are not openly recruited (in Getting on Board's 2017 research, 90% of charities reported that they had recruited most of their current trustees through word of mouth and existing networks). Therefore, it was not surprising to find that some of the participants who were not yet board members did not even realise you could apply to be a trustee – they thought you had to be invited.

A broad range of poor board recruitment practices was highlighted including:

- Only using existing networks to advertise the role or going to a small pool of known individuals: *'a very small group of people looking for a very small group of people who look and think just like them'*.
- Lack of a diverse range of recruiters.
- A general lack of understanding of how to attract more diverse people.
- Exclusive terminology in the role specification or recruitment pack.
- Overvaluing certain types of skills (e.g. academic or sector knowledge, subject expertise) over others (e.g. lived experience, community engagement): *'We are reluctant to look outside our sector, we don't see the transferable skills from other sectors. [We are] not fully recognising the value of diversity of thought, experience and skills'*.

One interviewee was clear that the worst-case scenario was when the outcome led to a visibly diverse board, but in reality that person did not represent diversity on the board because they *'fit the board'* in every other way in terms of education, class and so on.

'When we go out to recruit we do so in a way that maintains the status quo. When we do not get the diversity, we say we tried. And when we do, we think of all the reasons why we can't appoint.'



FOCUS GROUP REPORT

From the under-represented serving trustees: Inaccessibility

What we heard

There was a strong feeling that inaccessible written application processes for neuro-divergent participants meant those voices were being lost at board level.

Opportunities to explore

- Exploring different application processes with people who are neuro-divergent (e.g. video or verbal applications, and offering support with applications)



FOCUS GROUP REPORT

From the under-represented serving trustees: Once you're in, you're in

What we heard

Over half the group had been invited to their current trustee roles without needing to apply, and many held multiple governance positions. Trusteeship was seen as a good way to build connections in the sector and open up other opportunities; but those who had tried to get into trustee roles through application processes had experienced multiple knock-backs and a lack of communication.

Opportunities to explore

- Being transparent about how trustees are recruited
- Using open application processes as standard (rather than invitations to join boards)



Small pool of potential board members to draw from

Linked to the above, there was a strong sense among some people that the pool from which board members are drawn is small, as the workforce or members (for membership organisations) in the sector were not in themselves very diverse.

In membership organisations, there was recognition that trustees are often drawn from a *'few thousand active members'*, or those who had worked their way up through various internal committee structures. There was recognition that this pathway to the board was *'not formal or explicit'*. In those organisations where board members are elected, not only do you have to convince the existing board of the merits of diversity, but also your membership.

There was some recognition that getting a more diverse workforce will take time, but: *'If you have greater diversity on a board, will it encourage a more diverse workforce?' Or as one interviewee said: 'if we have Black people on the board, they are likely to be well networked in those fields. It becomes easier to attract other Black people. [You've] got to see it to be it.'*

In addition, there was recognition that people self-select to represent heritage – those who are older, retired and with more time to spare – while others worry whether what they have to offer is of value. This was evident among those who had considered a trustee role but not secured one yet. They felt their existing experience would need to be more senior and more specific to the sector, or that they would need to be older to be considered as worthwhile candidates in the first place.

'[I have] never been interested in being a trustee. I feel intimidated by it. I don't see myself as having considerable experience and background in the sector.'



In membership organisations, there was recognition that trustees are often drawn from a 'few thousand active members', or those who had worked their way up through various internal committee structures.



One interviewee also talked about not wanting to embarrass herself by applying. This feeling was also evident in the serving trustee group.



One interviewee also talked about not wanting to embarrass herself by applying. This feeling was also evident in the serving trustee group. They spoke about the sector as being highly educated, and that trusteeship had seemed an unreachable, elite position for someone from their background. All of this contributed to their sense of imposter syndrome, before and during their experiences as trustees, especially among younger participants. Indeed, it was not uncommon for those who were trustees to need to be convinced to apply for the role:

'I was asked to apply to be a trustee, persuaded by a headhunter. I didn't want to do it as I did not know about this field.' The headhunter was a friend and convinced them eventually.

'I wouldn't have applied. I'm not confident enough. I think other people would have been cleverer than me. I don't have time. They did have to convince me.'

But as another of the interviewees noted: *'Imposter syndrome is not all in our heads. It's about what others think we are capable of or not.'*

Arguably, this is linked to a system that values certain skills or sector knowledge over others, resulting in some people feeling emboldened to step forward, but others doubting themselves and their 'fit'.



FOCUS GROUP REPORT

From the potential trustees: Professional development vs my existing experience

What we heard

For the minority who had considered trusteeship, it was seen as a potential route for professional experience and development of leadership skills. However, the group as a whole felt their existing experience would need to be more senior and more specific to the sector, or that they would need to be older to be considered as worthwhile candidates in the first place. There is a tension between the desire to gain experience and not having enough experience to do the role in the first place.

Opportunities to explore

- Emphasising opportunities to gain leadership experience and for career development
- Being clear about the support available for trustees to be able to do their roles well
- Being explicit about what different experiences (that might not be related to seniority, age or sector expertise) would be valued in new trustees



ENABLERS OF BOARD DIVERSITY

Current national conversation on EDI

Since the growth of the global Black Lives Matter movement, participants felt there was more awareness of EDI issues in the sector, and active conversations about what organisations could and should be doing. For many, this wider external context has led to organisations wanting to be better and more inclusive (especially at executive level); but also a practical recognition that organisations will be disadvantaged if they are not more inclusive, as funders are now asking about this and factoring it into their decision-making.

Multiple interviewees mentioned the approach Arts Council England is taking as a positive step. [Arts Council England](#) is explicit that grant holders should work towards the 'diversity of audiences, leaders, producers and creators of creativity and culture' so that they 'reflect the diversity of contemporary England'.

Getting people talking about EDI

Despite the recent national and international focus on EDI, there is recognition that the sector would benefit from talking about EDI more, to get comfortable with the subject matter and truly understand why it is important and relevant. Participants saw creating safe spaces to have EDI conversations, through private as well as public debates (e.g. thought pieces from leaders in the sector), as important.

Examples of good practice cited were national gatherings of organisations in the sector, such as the Heritage Alliance's annual [Heritage Debate](#); or the Council for British Archaeology's [This is Archaeology Lecture Series](#), which participants saw as a good example of challenging perceptions of archaeology by bringing different voices and perspectives into the conversation.



Since the growth of the global Black Lives Matter movement, participants felt there was more awareness of EDI issues in the sector, and active conversations about what organisations could and should be doing.



Constitutions

Current articles of association and governing documents were a source of frustration for some. They felt these were outdated, and prevented or slowed down the EDI agenda at board level. Some of the barriers noted were:

- Three-to-four year board member terms, which means that change is slow to be implemented; or no fixed terms at all, which leads to long-standing board members.
- A limit on board size.
- All board members having to be elected, with no ability for the board to co-opt members.
- The majority of places being reserved for those who are 'of the sector' and a minority for 'lay' members.

For those who were taking steps to change their constitution to increase the number of board members or to introduce term limits, there were time and cost implications, which could be barriers for other organisations.

Lack of data

There was a strong indication that the extent of the problem was unknown. Interviewees were clear that their organisations did not really know about the make-up of their membership or the diversity of their current boards. Data about who makes up the sector in terms of demographics and skills was not systematically collected, and where data was available, it was not comprehensive (e.g. data that was extrapolated from an annual survey of members that had a limited response rate).



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Interviewees believed that more needs to be done to support staff and members of the public who are interested in heritage ‘to understand what governance is’.



Making governance more visible and appealing

Interviewees believed that more needs to be done to support staff and members of the public who are interested in heritage ‘to understand what governance is’. As well as this general awareness raising, some felt that the fundamentals of governance needed re-examining.

This ranged from having fewer but more focused papers for boards to consider, to a more radical overhaul of governance. As one interviewee said, ‘*unless we change what a board is there for, we will get the same skills needed*’ (e.g. a focus on risk, legal and HR skills). Another interviewee suggested that splitting out ‘*fiduciary duties like accounts/risk management etc. from how we can do better about the causes we are there to serve*’ would help to attract a different skill set at board level.



FOCUS GROUP REPORT

From the potential trustees: You can apply?! I’m not sure why I would.

What we heard

This focus group was the first time that some participants realised you could apply for trusteeship – they thought it was something you were invited to. Some expressed a lack of understanding of why trusteeship would be beneficial for them and therefore why they would apply; and the group as a whole brought up more negative barriers to trusteeships than positives opportunities.

Opportunities to explore

- Promoting trustee roles and application processes more widely, not necessarily just when advertising roles
- Finding different advertising routes for trustee roles that will be seen by different groups of people
- Promoting benefits of trusteeship in adverts (e.g. training, strategic experience, decision-making skills, greater sector knowledge)



FOCUS GROUP REPORT

From the under-represented serving trustees: Strategic input into a sector I love

What we heard

All were passionate about the sector and valued the opportunity to be part of decision-making for organisations they care about. This was especially the case for those who had been on the ‘other side’, working in more junior roles, and being frustrated that their recommendations and requests had apparently been ignored.

Opportunities to explore

- Emphasising the opportunity to be part of strategic decision-making as a key benefit
- Highlighting the opportunity to improve and represent the sector
- Sharing trustee stories of passion for the sector and how board members have been able to use their influence, and using these as inspiration for future trustees
- Making sure trustees are genuinely valued in decision-making processes

Representation matters

There was recognition that if you want to attract a more diverse group of people, you need to show that you are a welcoming and inclusive organisation. It is important how an organisation comes across via its website and in other public representations of itself. As one interviewee put it: ‘*diversity needs to be clear through your website, images, recruitment pack, who interviews you, the building you walk into*’. They noted that as a candidate the question you ask yourself throughout the process is: ‘*Do I fit?*’

A useful tip from interviewees for organisations looking to diversify would be to recruit at least two board members at the same time. Several interviewees noted that being the sole person on the board from a minority ethnic background, LGBTQI+ or with a disability was a very hard place to be. As the only Black person on a board, for example, it felt like you were there representing ‘*diversity*’, having to share personal experiences and educating other trustees.



There was recognition that if you want to attract a more diverse group of people, you need to show that you are a welcoming and inclusive organisation.



This perception was borne out by the experiences of people who were serving trustees. They noted that they were not EDI professionals, they just happened to have lived experience, and felt uncomfortable that other board members looked to them to lead in how they should approach and work with diversity when this was not their area of expertise. As one interviewee noted, the *'emotional labour'* of being the only person can weigh heavily upon them. The worst versions of this were people feeling they had been brought onto a board not to contribute, but to make it look diverse.



FOCUS GROUP REPORT

From the potential trustees: Nervousness about emotional labour

What we heard

While participants would love to bring diverse perspectives to boards, there was an overriding tension with concerns about the pressure of being expected to represent 'diversity' – sharing personal experiences and educating other trustees. The group questioned whether the personal cost of the associated trauma and stress was worth the opportunity offered.

Opportunities to explore

- Providing emotional care and support for trustees (and mention this offer when advertising roles)
- Creating a clear culture of shared responsibility for learning about and sharing diverse perspectives on boards
- Being explicit about the make-up of board members (e.g. the number of people from minority ethnic groups) and ensuring this is balanced, so potential trustees don't feel they will be a sole voice

Creating an inclusive board culture

A lot of comments were made about how meetings could be more inclusive. Organisations should ask themselves: *'Does the environment support that person to thrive?'* Some of this was about implementing what we already know to be good practice in governance:

- Ensuring the board is 'ready to do things differently, to know why they are diversifying, and the benefits'.
- Detailed induction for new board members.
- Buddying up new board members with existing members.
- A meeting structure that supports all voices to be heard, ensuring people feel comfortable and safe enough to speak up: *'How the space is held is really important [in terms of] valuing everyone's opinions.'* The role of the chair was seen as instrumental in creating this inclusive culture. While some interviewees recognised that the more diverse the board, the harder the role of the chair was in supporting all voices to be heard and coming to a consensus, their leadership and role modelling was core to making the difference. One interviewee noted for example how their chair had made it clear to them that they wanted their *'full contribution, [the chair] doesn't want me to just talk about diversity, but to have a rounded view'*, which they found supportive and reassuring. For others, leadership was a central first step in the journey: *'unless the chair and CEO are pro-active in diversifying their board, I'm not sure it would happen by itself'*.
- Wellbeing support, in particular for trustees who are bringing their lived experience and expertise into the room.



A lot of comments were made about how meetings could be more inclusive. Organisations should ask themselves: 'Does the environment support that person to thrive?'



CASE STUDY



Ongoing training for all board members to ensure a more inclusive culture, where all board members are equipped to contribute. There was a sense that this training was often bypassed and treated as a 'nice to have'.



- Being accessible: *'Move beyond welcoming and understand the things they need – like, is the documentation available in different formats, in plain English? Is the room accessible?'* Interviewees spoke of the imperative of *'understanding the external barriers'* and *'what reasonable adjustments [are needed] and acting immediately'*.
- Ongoing training for all board members to ensure a more inclusive culture, where all board members are equipped to contribute. There was a sense that this training was often bypassed and treated as a *'nice to have'*. Participants believed that all board members should be trained on what the role of a trustee is (if only as a reminder) and on good governance. For young people, in particular, who have fewer years of experience, *'training accelerates the learning process'*. It was also felt that all board members should receive more specialist training. Suggestions included disability equality training (*'[to] understand the barriers that are disabling [people]'*) and anti-racism training (*'getting everyone on the same page is crucial [so] someone coming in is not having to educate the others [about racism]'*). Interviewees felt there should be *'training for everybody, understanding that it's not about there being a deficit amongst minoritised trustees, just that all trustees need to be highly competent'*.
- Interviewees recommended communicating the expenses policy clearly by *'being more open about that, rather than me going to them.'* It was seen as a good idea to have an open conversation to see if finances were going to be a barrier to participation and how this could be addressed: *'If you want to diversify beyond middle-class groups, you are going to understand that people are taking a hit. If you feel uncomfortable talking about it, it can become a real issue.'*

Experiencing an inclusive board environment vs an exclusive one

One interviewee described the opposing experiences of the two boards to which they belong:

On the diverse board where I am vice-chair, we talked about who we are, why it's important to authentically bring ourselves to work. [This was] not a formal induction but half of the first meeting, so we set the foundations right.

This means I can be authentic. [Sometimes] we worry about bringing ourselves to the table, make sure we are being palatable, that we don't fall into stereotypes. I don't feel that. I can just say what I think [which] promotes problem solving and good conversation. No one is filtering what they are saying. People are feeling comfortable to put forward thoughts and ideas. No topics are off the table. No one feels offended or feels attacked. [We] recognise that we are dealing with the entirety of the issue.

On my other board, it's hugely transactional. Many [board members are] moving from one [health-related] board to another. [They are] very clever and well-intentioned but [don't have] as much connection to the real world. [They] hold a lot of privilege and don't come out of this world so often. There was no ground rules conversation. The induction was about the organisation and strategic objectives, rather than fostering of inclusion.

I used to have an inner dialogue in my head, a monologue. I should have said something. The moment passed. [I felt that I was] not adding much value. It took a while to pick up the confidence to say it, but it took a while and I have decades of experience and if I am struggling based on the colour of my skin what chance has someone else got?





FOCUS GROUP REPORT

From the under-represented serving trustees: Culture comes from the chair

What we heard

Good and bad experiences of contributing to and feeling valued on a board stem from the chair. Participants told us that making sure everyone was heard is crucial, as often strong voices are heard more loudly. They also shared examples of chairs' views being prioritised over the rest of trustees (e.g. in minutes of meetings), rather than their leadership role being about facilitation, which is what they believe it should be.

Opportunities to explore

- Provide facilitation training so chairs are able to welcome, hear and make sense of diverse perspectives
- Creating clearer and more structured decision-making processes that give all trustees equal weighting

Inclusive recruitment practices

Various factors were confirmed as good practice in recruiting trustees, to implement *'anything to decrease subjectivity and increase objectivity'* in the process:

- Anonymised recruitment, to hide identifying information and personal characteristics when considering applications.
- Openly advertising roles (but simultaneously identifying and approaching people you think would be good in the role by encouraging them to apply).
- Looking for people outside the organisation and beyond your usual networks.
- Using recruitment agencies that have a track record in recruiting diverse board members.
- Offering pre-application sessions to chat with the CEO, chair or other trustees.



Various factors were confirmed as good practice in recruiting trustees, to implement *'anything to decrease subjectivity and increase objectivity'*



Better articulating the benefits of trusteeship (e.g. training, experience, decision making, increased sector knowledge); but recognising that different people will have different reasons for getting involved.



- Offering various ways to apply, not just a written application and CV (e.g. using British Sign Language, video applications).
- Providing interview questions in advance.
- Showing model answers, to demonstrate the type of information you would like to see in people's applications.
- Taking the jargon out of role descriptions.
- Being clear about the skills and experience you are seeking, where your organisation is under-represented and the type of person you are looking for (e.g. an EDI expert to champion this agenda at board level).
- Communicating what you don't need, such as previous board experience, which *'will make someone like me think your organisation will take me seriously'*.
- Better articulating the benefits of trusteeship (e.g. training, experience, decision-making, increased sector knowledge); but recognising that different people will have different reasons for getting involved. We observed through the focus groups with potential and serving trustees that for more experienced people it was about *'having power to make change'* that appealed to them. For others, they could see how a non-executive role could support them to develop professionally, or gain experience and networking opportunities in the sector they could not get elsewhere. Assuming that everyone is motivated by a *'philanthropic mindset [and] doing good for others means a particular type of person comes forward'*.
- Interview panel training.
- Diverse interview panels (commissioning external panellists if necessary).
- Inviting an observer to monitor and evaluate the process.
- Paying interview expenses.
- Streamlining the application process, so it isn't long, confusing and onerous for applicants.
- Providing peer support or mentoring to guide people through the application process.





Interviewees noted that the sector would benefit from broadening its view of what skills are needed to sit on a board.



Participants felt much of the above is well known, but when it came to non-executive roles, recruiters did not employ the same standards as they might when hiring at an executive level: *'It feels like the organisation's [recruitment] policies don't apply at board level. They feel it's complicated, bureaucratic. It removes [their] control and power'*. One interviewee thought, *'there is not much evidence of the public sector equality duty being applied at this level.'*

Many interviewees were keen to emphasise the importance of knowing what the skills and/or diversity gap of the current board is, compared to the community the organisation serves, and recruiting in accordance with what the data shows. What they saw as a problem was when boards jumped to the conclusion that the *'solution is to get people who look different'*. They felt instead: *'Our focus should be how to create inclusive governance structures that allow a variety of voices to be amplified. Lead with inclusion first.'*

Interviewees noted that the sector would benefit from broadening its view of what skills are needed to sit on a board. They discussed whether board members always needed a degree, or sector expertise, or a certain level of seniority in their day job.

Interviewees generally disliked generic diversity statements. They felt that having a sentence that an organisation welcomed applications from a broad range of people on its own without anything else is tokenistic and meaningless: *'I don't trust that. What else do they have to say other than sticking that sentence at the end of the advert?'*

Some interviewees noted that sometimes organisations should recruit based on potential: *'Be open to [taking] less experienced candidates – taking a chance on someone that can develop is worth it as they will have a less insular view.'*

One interviewee noted that if we are to have new faces and voices at governance level, *'sacrifices may have to be made. People in power currently may need to make space, to give up their roles for new faces.'*



FOCUS GROUP REPORT

From the under-represented serving trustees: Non-linear pathways

What we heard

Most trustees we spoke to had 'non-linear' pathways through the sector and into trusteeship (e.g. no higher education) and felt they were in the minority. They spoke about the sector as being highly educated, and that trusteeship had seemed an unreachable, elite position for someone from their background. All of this contributed to imposter syndrome, before and during their experiences as trustees, especially among younger participants.

Opportunities to explore

- Sharing stories of trustees with 'non-linear' pathways and of younger trustees
- Being explicit in trustee adverts that higher education isn't a requirement
- Making support and space to grow into a trustee role part of the process of joining a board (e.g. providing a trustee buddy during onboarding and to answer questions)

Actively increasing the pool you recruit from

Many interviewees and participants recognised the value of supporting and nurturing a pipeline of potential trustees. They gave examples of several models, including:

- Shadow trustees and shadow boards, which engage in the business of a board without being full board members.
- Trainee trustees.
- Board observers.
- Spotting talent and building a relationship with that person: *'They want me to join the board. They have built a relationship with me over time and know I have value to bring to the table. It's an organic, natural relationship. I have attended some of their meetings.'*
- Recruiting a wider group of people to join special interest groups and committees, so people are exposed to governance structures: *'There are board sub-groups that support board structure. They are really influential. They can be diverse. [For the organisation, this is] playing the long game with board roles.'*



Many interviewees and participants recognised the value of supporting and nurturing a pipeline of potential trustees.





Many interviewees noted that the sector needed a makeover to raise its profile and make it appeal to a much wider audience.



The key was thinking about what would give people the ability to step into a governance role with confidence. In this context, getting the opportunity to do a *'vibe check'*, where you could spend time with a board to understand the culture and accessibility before applying for a role, was seen as helpful.

In addition, it was believed that the pool could be increased if the heritage sector was more willing to value lived experience and expertise as much as it valued practice and learned expertise, and knowledge, skills and experience from other sectors.

Better storytelling

Many interviewees noted that the sector needed a makeover to raise its profile and make it appeal to a much wider audience. As one interviewee noted, *'people have to be stakeholders in that heritage, finding that link. That's why it's important to make the work of the organisation relevant to the diverse communities that live in the UK today, then it's easier to diversify the board.'*

A key part of this was better storytelling. Interviewees felt that heritage could be made more relevant to more people with regard to issues around our colonial past and contestation through storytelling:

- *'Blending buildings [heritage] with the cultural heritage story more, [to] see the full colour of life in [our] communications. Move beyond the stuff, to the people.'*
- *'Make the story more relevant to more people.'*

Collaborating with others

Participants explored the value of collaboration in this space and discussed working with some of the other big players in the sector (e.g. the National Lottery Heritage Fund, National Trust, English Heritage). The premise was that bigger organisations with more resources could combine their knowledge and resources to support the myriad of smaller organisations in the sector that lacked capacity and skills.



For EDI work to be meaningful and authentic, and to avoid it falling into the realms of tokenism or project work, participants felt building EDI into an organisation's wider strategy was key.



However, the idea that got the most traction was to *'think about organisations that attract a different group of people and partner with them'* – in other words, smaller organisations that represent the people's heritage sector, which was perceived as more vibrant and diverse: *'I do not live in the communities where the issues are, so collaborative working is really important [on] a level playing field. [You should] listen to the agenda of the people you are going towards.'*

One interviewee commented: *'We want that group over there to come to us. I am saying I want to go over there.'*

'It's a marathon, not a sprint'

Board diversification takes time and that is OK. There was broad recognition that it's better to do this work well than to rush it: *'Change can't happen immediately. Don't run before you can walk.'* Identifying a progression framework that works for you and taking one step at a time to progress is absolutely fine. However, participants also advised, *'don't let perfect be the enemy of good'*. Things might not work the first time: *'[If you feel you have] done everything but still not recruited a diverse person, don't give up. Reflect on the process and learn, think about what else could be done next time.'*

Building EDI into organisational strategy

For EDI work to be meaningful and authentic, and to avoid it falling into the realms of tokenism or project work, participants felt building EDI into an organisation's wider strategy was key. One needed *'honest reflection and radical action'* and *'an approach that led to a vision of transference, of power, wealth, assets'*. They felt, *'it's not a serious strategy if it's still upholding the same extractive systems'*. For this reason, it was important not to *'divorce governance from the rest of the organisation'* for any attempt at cultural change to be realistic:

The amount of things that have happened since George Floyd died have been amazing. [There has been a] real push for board to diversify, but we need to feel like it's a genuine commitment and not just a reaction. It needs to be about the whole organisation not just governance. The organisation needs to embody a commitment to representation and inclusion in every aspect of what they do.



As another interviewee noted: *'[It's] theoretically possible to have a diverse board but then have a staff team that looks like it walked out of the 1950s'. It was noted how this 'can make minoritised trustees quite vulnerable, if [they are] in an organisation that does not reflect a commitment to EDI. You can place those board members to answer for practice at an operational level that is not very positive [in terms of EDI].'*

The role of Historic England

Interviewees felt that Historic England should lead by example. As one employee of the organisation noted, *'Historic England won't be able to help unless we practice what we preach. [We won't have] a big currency unless we get our house in order.'*

Interviewees suggested ways Historic England could do this through:

- Better representation in senior roles in terms of, for example, colour, class and disability, to *'teach others from a place of experience, with a knowledgeable senior team.'*
- Ensuring that the people who represent Historic England and the sector at key events (e.g. in panel discussions) are more representative of wider society. One interviewee noted that at a recent event the keynote panel representing the heritage sector only included white men of a certain age. They felt this cemented an unwelcome image of the heritage sector.
- Collaborating and working with a range of organisations, especially those which demonstrate best practice in EDI.
- Celebrating and recognising the benefits of greater diversity.
- Being open in its approach (and not defensive), and open to learning and changing.

As part of this work, Historic England asked Getting on Board to make a series of recommendations about practical interventions the organisation could make to improve board diversity in the heritage sector. A summary of these can be found in the next section.

RECOMMENDATIONS TO HISTORIC ENGLAND

Possible interventions by Historic England

	Webinars, blogs and case studies on board diversity		Access to training and expertise on inclusive governance
	Training programme for organisations on inclusive trustee recruitment		Facilitated discussions with other organisations to look for joint ways to influence this agenda
	Training programme for aspiring trustees		Review of grantmaking levers: guidelines, forms, assessment, grantee support
	One-stop shop to promote trusteeship and board positions		Guidance and support to change constitutions
	Pipeline schemes for aspiring trustees		Building board diversity into existing learning, reports and other programmes
	National survey on board diversity		Learning materials on trustee diversity and inclusive governance, including case studies

“Interviewees felt that Historic England should lead by example. As one employee of the organisation noted, ‘Historic England won’t be able to help unless we practice what we preach.’”



Possible interventions by Historic England (2)

	Thematic trustee network for certain groups of trustees (e.g. young trustees, trustees of colour)		Signposting free resources and training already available
	Board diversity learning network for sector leaders		Inclusive board training for individual boards
	Continuing to give board diversity a high profile in your strategic plans		Funding a programme for board diversity initiatives in the sector
	Publishing this research		

Getting on Board is a trustee recruitment, diversity and effectiveness charity. It is our guiding belief that board diversity is key to effective decision-making, better delivery of a charity's services and the broader goal of creating a more equitable society. You can access further guidance and training via our website at www.gettingonboard.org.

Front cover: Each interviewee was asked to give three words that came to mind when they thought about governance in the heritage sector. This is a word cloud of their responses.



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