

‘In whom we trust?’: the experiences of trustees in learning disability charities

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Abstract

The purpose of this paper is to explore the experiences of volunteers who are trustees in learning disability charities. Addressing a gap in the study of charity governance, we consider (i) what it means to be a trustee; (ii) what trustees do and (iii) what it is *like* to be a trustee. We argue that the complexity of the trustee volunteer experience suggests a need for a dynamic understanding of trusteeship. Drawing upon Seward (2010, 2009, 2006), we discuss “what is going on *in* trusteeship?” and the experiences of trusteeship as a series of representative claims. This is particularly pertinent to charities that work with and/or for people with learning disabilities where questions of representation are highly complex and politicised. The article presents a novel perspective on trusteeship to further our understanding of how trustees negotiate and address the demands of the position.

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Trustees have ‘independent control over and legal responsibility for a charity’s management and administration’ (Charity Commission for England and Wales, 2018: 2). Trustees also have regard to the moral stewardship of the charity, ensuring alignment to its charitable purposes. They serve as guardians of the charity’s integrity and interpreters of the charity’s core values (Walton et al., 2017: 116; Harrow and Palmer, 1998: 174). Trustees are expected to be loyal to the cause or objectives which the organisation was set up to serve (Smith, 1992: 334-335). The position of trustee remains an inherently voluntary one, notwithstanding the discussion about remuneration that followed the Hodgson Review of the Charity Act 2006 (Lord Hodgson, 2012) and the limited provision for the remuneration of trustees (Charity Commission, 2018: 18). In recent years, trustees have had to fulfil their responsibilities in a complex and challenging economic and political climate (Metcalf, 2013; Davies, 2011). Scandals about poor governance have raised fears about damaged public trust in charities and have led to questions about whether charities are best governed by volunteer trustees (Rawnsley, 2018; Singh, 2017).

Research on charity governance has grown in recent years, addressing a range of themes, as discussed in seminal reviews of the literature (Cornforth, 2012; Stone and Ostrower, 2007). The motivations of individuals to volunteer to become members of a charity’s board, often referred to as governance volunteers has received scholarly attention (Walton et al, 2017; Inglis and Cleave, 2006). However, the experiences of volunteers who are trustees remains an under-researched part of the theoretical and empirical analysis of charity governance. We suggest that a critical appreciation of the trustee volunteer experience needs to be grounded in an understanding of: (i) what it means to be a trustee; (ii) what trustees do, which manifests in how they interpret the trustee role(s); and (iii) what being a trustee is *like*. Drawing upon the work of Michael Saward (2010, 2009, 2006), we discuss how the dynamism of trusteeship,

which is encapsulated in the trustee volunteer experience can be conceptualised as representative claims. Seward (2010: 13) argues that the study of representation should extend to electoral and non-electoral positions and that it should be conceptualised as something which is ‘dynamic across societies.’ He argues that posing the question: “what is going on *in* representation?” is more instructive than defining what it *is*. By unpacking the trustee volunteer experience, we present and discuss a novel exploration of “what is going on *in* trusteeship?” through the lens of representative claims.

We narrow our analysis to charities that work with and/or for people with learning disabilities (henceforth, learning disability charities). As charitable organisations they have not been subject to extensive analysis in recent policy contexts (Fyson and Fox, 2014; Acheson 2001; Drake 1996; 1994). Their governance is rooted in a politicized relationship between the Disabled People’s Movement, the fundamental ethos of charity and how charitable organisations enact this ethos. In this way, we also provide a more nuanced investigation of the experiences of trustees in a common setting. The paper proceeds as follows. Following a review of the literature on the volunteer experience, with a particular focus on trusteeship, we further contextualise the relationship between charity, charitable organisations and disabled people. The methodology and, then, the findings of the study are presented and discussed in terms of their contribution to the extant analysis of charity governance and avenues for further research. The principal contribution of the paper lies in how it addresses the trustee volunteer experience, a neglected aspect of the literature on charity governance. Further, we extend Seward’s work to make a novel case for the conceptualisation of trusteeship as representative claims, which captures the complexity of the trustee volunteer experience.

The Volunteer Experience

The study of volunteering is broadly framed by three questions: (i) why do people volunteer? (ii) what is it like to be a volunteer? and (iii) what are the consequences of volunteering? (Wilson, 2012; Omoto and Snyder, 1995). With an emphasis on what needs individuals seek to satisfy through volunteering and whether those needs are met, functional theories of volunteering motivation capture one aspect of the volunteer board member experience (whether people remain or leave volunteer positions, or stop being a volunteer altogether) (Walton et al, 2017; Inglis and Cleave, 2006). Wilson (2012: 196-197) argues that a single reliance on motives does not suffice: ‘we also need to know what the volunteers are doing’.

The analysis of the experiences of volunteers who are trustees first requires attention to the meaning of trusteeship. In the case of endowed trusts or private foundations, trusteeship is associated with the stewardship of a particular asset but equally, according to Smith (1992: 353) trusteeship can take a number of forms:

We have an identifiable form of trusteeship whenever a cause or mission defines a group’s identity so that we can speak of a duty to beneficiaries that is created and constrained by the organisation’s sense of purpose or the cause that it exists to serve.

Smith (ibid.: 357-361) suggests that trustees should be guided by a number of *moral principles*: first, the fiduciary principle, that is, loyalty to the organisation’s cause; second, the common good principle, whereby trustees must ensure that the organisation acts in accordance with morally acceptable purposes in a society; and, third, the principle of interpretation. Attention to *either* the fiduciary *or* the common good principle can pull the organisation in different directions. To mitigate the effects of this, the board acts as a ‘community of interpretation’ of the organisation’s past, present and future.

The meaning and significance of trusteeship is also addressed in seminal studies of representation. Hanna Pitkin's (1967) concern with trusteeship lies in how she contests the equation of trustees with democratic representatives. The trustee has a duty to the needs of beneficiaries, but is neither accountable to them, nor does s/he act in their name (ibid.: 129-130). In contrast to Pitkin, Michael Saward (2010: 39) argues that it is instructive to explore 'how meanings [of representation] are generated and contested' through representative claims by elected and non-elected actors. He articulates the definition and core elements of a representative claim as follows:

'A representative claim is a claim to represent or to know what represents the interests of someone or something' (op cit. 2010: 38).

When an individual makes a representative claim (a 'maker'), s/he may present themselves (the subject of the claim) in a particular way for example, to know how to best serve the interests of a charity (the object of the claim) as a trustee.ⁱ Makers offer a conception of the subject, who they are and what they have to offer, *and* of the object, what its interests and needs are, which gives rise to particular understandings of the status or position which is inherent to the claim. Saward (2010: 48-50) argues that there are two types of audiences which are receptacles for claims: intended and actual. In making a claim for an intended audience, the maker suggests that s/he speaks for a group, for example and will both 'portray and offer some conception of the group's interests' (ibid.: 46-49). Alternatively, there may be an actual audience for the claim: they hear or recognise their interests within the claim, and may choose to respond, even contest it (op. cit.; Saward, 2006: 302). There can be a variety of bases to a representative claim, for example, a claim to have a special form of expertise. Roles can also serve as resources for

representative claims. Saward (2010: 72; 2006) cautions against the reification of fixed representative roles in typologies as the ‘unfinished and unstable character of representation’ may be overlooked. Roles can be moulded to bolster the representative claim an individual wishes to make, and to undermine the claims of someone else to know how the interests of a group/organisation can best be served. This is a potentially novel way of analysing the roles of trustees, which complements perspectives on the dynamism of what trustees do.

The analysis of roles within charities features as part of the study of the governance of charitable organisations. Key themes include explorations of board and staff perceptions of the roles of the board and how the features of the internal and external environment may variously affect the board composition, the interpretation of roles, the power of a board and how some roles are prioritised over others (Cornforth, 2012: 1128; Guo and Brown, 2010: 544; Stone and Ostrower, 2007: 421; Bradshaw 2002). The extent to which there is clarity amongst members about their roles and responsibilities, matters in terms of whether the board is perceived to be effective or not (Cornforth, 2001). Harrow and Palmer (1998: 174) note the potential tension that may characterise trusteeship: the need to balance one’s involvement in the charity with being able to maintain a broad and impartial overview of how the charity is perceived externally and how well it is doing. In a longitudinal study of the Board Chair-CEO relationship, Cornforth and Macmillan (2016: 965) underline that neither formal descriptions of roles, nor assumptions about the power dynamics of relationships tell us about how the relationship between, and the roles and activities of the Chair of the Board of Trustees and CEO continuously evolve and are subject to ongoing renegotiation, particularly in response to circumstantial factors.

Beyond a focus on charity governance, the nature and quality of what Lu and Schuett (2014: 69) term ‘face to face interaction’ is salient to what it is like to be a volunteer. This includes whether an individual feels that their contribution is valued (Talbot, 2015) and/or whether they are clear about their role(s) (Rogalsky et al., 2016: 455-456). The relationships the individual cultivates with those in similar roles and other stakeholders, such as the Chair-CEO relationship discussed by Cornforth and Macmillan (2016) is key to the volunteer experience (Wilson, 2012: 195). Volunteers continually make sense of what is expected of them and their identity with and, arguably integration within, the organisation (Tornes and Kramer, 2015; Omoto and Snyder, 1995). Refining our focus to learning disability charities, an understanding of past and present nuances, including challenges facing this group of charities is salient to making sense of all dimensions of the trustee experience for trustees of these charities.

Charities that work with and/or for people with learning disabilities

Learning disability charities are part of a broader subset of over 700 disability charities in the voluntary and community sector (Acheson 2001).ⁱⁱ The history of the relationship between the Disabled People’s Movement and charity is pertinent to the relatively unique sources of conflict and challenge that confront learning disability charities. The Disabled People’s Movement has made a number of criticisms of charities (Barton, 1996). Firstly, that the ethos and focus of disability charities was the creation of ‘helpers’ and those to be ‘helped’, and to do this requires ‘need’ to develop from a ‘condition’. It is argued that this medicalisation of charities is unhelpful and misleading. The social model of disability contests disability as a tragedy or medical condition, instead framing it as social and environmental oppression (Oliver, 2013; 1983). It emphasises that vulnerability is created by a number of factors including poverty and social exclusion (Hollomotz, 2011; Acheson, 2001: 281). The affirmation model of disability

has evolved which reframes disability as not useless difference but a useful difference or resource (Swain and French, 2000). Second, the focus for fund raising often pivots around imagery and narratives of the helpless, dependent, pitiable, brave and tragic which degrades disabled people (Beresford, 2016: 187-189). Finally, the control of resources within charities tends to be held by non-disabled people, who may manage resources in a politically inert way (Drake, 1996, 1994).

The principle of self-advocacy, the ability to speak and act for oneself has been an important part of the challenge people with learning difficulties have posed to carers and professionals speaking for them (Beresford, 2016: 202). Questions about the representation of disabled people are pertinent to service-user involvement in the design and delivery of services, which may include charities. Service agencies have been criticised for perpetuating a narrow, formal view of representation, with all its inherent biases and barriers for disabled people (Beresford and Campbell, 2006: 186). The engagement and inclusion of disabled people as service-users has been shown to work well when their participation is meaningful and empowering (Fyson and Fox, 2014; Hoole and Morgan, 2011). Notwithstanding, debate about the representation and involvement of disabled people tends to be pitched at the operational level of service delivery, with less attention to representation and involvement in relation to governance. The Charity Commission offers guidance on good governance in terms of the recruitment of trustees, including individuals with learning disabilities and the functioning of the board.ⁱⁱⁱ It does not offer specific guidance on how the Mental Capacity Act 2005 and the code of practice that accompanies it should be interpreted by boards of learning disability charities (Department of Constitutional Affairs, 2007).^{iv} In particular, the distinction between autonomy, capacity, wise and 'unwise' decisions remains a legally grey matter (Arthur, 2016). This specific area of the disability sub-sector of the voluntary and community sector brings into focus particular

experiences, including tensions or otherwise between the cause and governance of the charity from a trustee perspective due to the unique and complex needs and issues facing such charities.

Methodology

In order to explore the experiences of trustees in learning disability charities, qualitative methods were adopted, underpinned by an interpretive approach, thereby facilitating a contextual understanding of practice from the perspective of the ‘pluralistic reality of the actors themselves’ (Reinecke et al, 2016: xiv). We employed semi-structured interviews to allow the interviewees to express their opinion on a number of pre-determined topics. This also gave room for us to probe issues that needed clarification or further detail (Jones & Solomon, 2010; Beasley et al., 2009). This method is inherently appropriate to this research to gain ‘rich insight’ into the “black box” of trusteeship and charitable governance (Stoner and Holland, 2004: 257).

A focus on learning disability charities as a common uniform cause promotes internal consistency within the research across the trustees and their respective charities. All of the organisations are located in a single region of England. Trustees from these charities were recruited based on the authors’ regional knowledge of, and networks within this sub-sector of disability charities and the use of internet-based resources to search for, and gain access to the trustees from the range of identified charities. Interviews were carried out across the research team to help minimise personal association and any bias which may arise. At the conclusion of each interview, additional contacts were requested which the participant could recommend we contact. An outline of the project and the research agenda was sent out in advance to the interviewees. This also enabled us to ensure commonality of method and approach between the participants as the interviews proceeded. All participants were guaranteed anonymity to encourage them to speak freely on issues.

We had ethical procedures in place in line with the Mental Capacity Act 2005 to undertake interviews with trustees with and without learning difficulties. However, we were at the behest of the participating organisations to provide contacts for us to interview and the opportunity to include the views of people with learning disabilities in our research was not forthcoming, primarily reflecting the lack of trustees with learning difficulties.^v Further, whilst we did consider expanding the interview group to non-trustees, or service-users, for example, to wider internal operational roles between the board of trustees and user groups, the scope of the research was specifically to engage with trustees.

Using the Charity Commission for England and Wales's online Charities' Register, details of the mission and size of each trustee's charity which was obtained (Table 1). The interview questions were designed to elicit the participant trustees' thoughts on key themes we felt were pertinent to understanding the trustee volunteer experience, including: the roles and duties of being a trustee; loyalty to and/or understanding of the charitable cause; levels of involvement in the charity, including how they distinguish between governance and management; opinions on the make-up and operation of the board, incorporating in what ways they use their skills and, finally, personal reflections on what being a trustee means to them. A total of 14 interviews were conducted with trustees. Only two interviewees were fairly new to the role (010, 011), with no more than three years' experience. By contrast, two other trustees were close to the end of their maximum terms at the time of interview (001, 006) and one had recently returned to the charity as a trustee after an interval (005). About half of the interviewees told us that they were retired or semi-retired and the majority of interviewees were men. All of the trustees were formally engaged with their respective charities for only a small period of time in a week and hence flexibility was needed in securing interviews (for example, a small number requested

to be interviewed by telephone). All of the interviewees provided their informed consent and all of the interviews were recorded and subsequently transcribed. A copy of their transcription was shared with each interviewee.

The transcript analysis employed in the research draws on a version of the staged approach suggested in Easterby-Smith, Thorpe, and Lowe, (1991) and used in other interview based research (Jones & Solomon, 2010). The open review of the transcripts led to a number of key themes emerging from the data. Initially, all of the transcripts were read by the researchers to be familiar with the general findings across all of the interviews (Broom, 2005). The research team then met to discuss emergent open coding themes (Ezzy, 2002) and their relationship to the research questions (Grant, 2007). Following this open coding of emergent themes, a formal coding sheet was developed to consolidate and reflect the recorded themes. The authors re-reviewed all of the transcripts and associated codes in group discussion choosing or rejecting data based upon our 'interpretive sensitivities' (Phillips & Hardy, 2002: 75). This meant that a healthy degree of interpretive tension existed, allowing our interpretations to be challenged and debated across the research team. This continued until we felt inter-coder agreement on themes had been reached. All of the transcripts were then formally coded in the selective coding phase (Strauss and Corbin, 1998; Ezzy, 2002). The interview findings linked to the research focus and associated main themes emergent from the analysed transcripts are now presented.

Table 1 here

The trustee volunteer experience

(i) Meaning of Trusteeship

Echoing the common good principle outlined by Smith (1992), all interviewees mentioned the safe and prudent stewardship of the charity as fundamental to what it means to be a trustee, some specifically mentioning the accusations of poor governance that have befallen other charities in recent years. For example:

“I really feel that there is a responsibility to look ahead and plan responsibly, morally and ethically, but also that the people who do the work have a safe structure in which to be creative.”

(008)

A number of trustees felt that it was, nonetheless imperative that a board of trustees had, in the words of one interviewee, “financial nous” and that it was certainly not “a bunch of do-gooders working towards their CV” (001). However, another participant lamented that there is now “less emphasis on what Trustees mean” and more importance awarded to their usefulness to the charity (013).

We also sought to explore the centrality of the fiduciary principle to trusteeship. There was a split between those who indicated that having someone with an understanding of the cause on the board was important but, as long as a trustee is committed and has a sense of empathy with people who have learning disabilities, it is something that can be learned by being a trustee (010). For some interviewees, having individuals on the board with direct experience of what it was like to be disabled or have a child with an impairment was believed to be salient, as underlined by this interviewee:

“[It is] [v]ital. Because there have been some horrendous instances of people working with or alongside people with learning disabilities and decisions have been taken without the best interests of people involved” (005).

There was a view that expertise by experience (Beresford, 2003) needs to be combined with business acumen but these interviewees stressed that the Board needs to be engaged in decision-making that reflects the needs and wants of the stakeholders it exists to serve. One interviewee specifically stressed the need for trustees to be aware and informed about the challenges the social and political context poses for disabled people (013). For some interviewees, being a trustee of a learning disability charity; having responsibility for the moral guardianship of the charity and ensuring loyalty to its core mission requires some consideration of how people with learning disabilities should be represented and heard as part of the governance of the charity. This interviewee was passionate in his/her argument that provision for people with learning disabilities on boards should be meaningful, authentic and well managed:

“So I think that if you’re going to have a board member or members with a learning disability, then you really have to be creative in how your Board is run and how your papers are produced. I really think that because I’m not in for tokenism. I’m really, really not. I’m very against tokenism. It’s wrong. Totally wrong. Yes all disabled people have a story but unless they can tell their story, in a meaningful way, for them, then it’s worthless almost” (003).

Two trustees (007, 008) of the same organisation spoke of how their charity had co-opted people with learning difficulties on to their Board of Trustees, though they were not legally registered as trustees of the charity. Rather, at the behest of a former Chief Executive, the

charity had set up a weekly forum for members and users of the charity to raise things that they wanted the Board to consider. This also acted as a conduit for the Board to share and discuss information with users of the charity. One of these trustees was dissatisfied with this arrangement likening it to more of a “reporting structure” and suggested that “the actual meetings aren’t very inclusive I don’t think” (007). The other interviewee underlined the organisation’s aspiration for people with learning disabilities to become “fully fledged board members” but equally suggests that the organisation is cautious:

“That’s what we’d like to work towards but we need to be mindful of many different things, including the legal requirements and responsibilities of trustees” (008).

Trustees from three organisations, including the aforementioned charity spoke of their efforts to ensure that people with learning disabilities were represented on the boards of their charities and a fourth has disabled people on its board. For one of the first three organisations, this appears rather aspirational, and this interviewee stressed the need for resources, including personnel to support people with learning disabilities on a board of trustees (012). An interviewee from a charity that has people with learning disabilities on the board described how the board and the charity’s staff work to accommodate and support their board members, giving people freedom to find their place and define their role on the board in an informal way, rather than ascribing formal roles to individuals (013). The extent to which the board facilitates and, indeed, actively considers and promotes representation for people with learning disabilities was salient to the trustees of these organisations and our findings illustrate how some organisations attempt to include people with learning disabilities. However, there are tensions between a wish to be inclusive in a meaningful way; the resources needed to support inclusivity and the legal stewardship responsibilities of trustees.

(ii) What Trustees do: interpreting the Trustee role(s)

Amongst the majority of interviewees, there was a delineation between management as, for example, “more day to day operational matters” and governance as “overseeing that things are done as they should be done” and that this “becomes a particular set of responsibilities – transparency and reporting” (014). Notwithstanding, the role(s) of the trustee is articulated less as the staid performance of particular roles but rather as a process of interpretation of what they should and should not be doing. One interviewee articulated his/her role as one of “attached observance and challenge to the executive team rather than stepping in there, knowing that there’s something to be done, rolling your sleeves up and doing it” (004). This interviewee, and others with a similar view, also spoke of their willingness to help with particular issues and be a source of guidance outside of the formal trustee meetings. Despite intentions and views of the distinction between management and governance, it can be challenging to maintain in practice. One interviewee spoke of the challenges of finding a balance between the “mentoring and strategic” role of a trustee and reining in his/her “natural enthusiasm” to become more involved in the charity (001). The same interviewee quoted above reflected:

“Sometimes we as Trustees challenge each other about if we’re getting too involved. It’s difficult. You know, there I am as the Trustee allocated to help with the Five Year Strategic Plan. How do I stop my ideas becoming the plan, rather than the Executive’s ideas and challenging their ideas, because you throw things out to think about and suddenly people say ‘well hang on, is that their idea or yours?’” (004).

Being a trustee is a balancing act, likened by other interviewees as someone who must be “in sympathy with the aims of the organisation [but also willing to be] dispassionate” (002); or, a

“critical friend ... Not overdoing it but when you’re asked to or when it’s necessary” (006). For some interviewees, there was an appetite for greater involvement with the charity and the employees of the charity. One interviewee felt that being more involved was integral to the performance of the trustee role, though in his/her experience, this has the potential to generate tensions between trustees and the charity’s staff (008). Similarly, some trustees had experience of becoming more involved with the management and running of the charity, and often the experience was negative. The day-to-day involvement of one participant had revealed failings within the organisation and difficult relationships between staff that were not being reported to the Board of Trustees. However, s/he still believes that being a source of support for the staff is important and wonders whether trustees could potentially act as a public advocate for people with learning disabilities in response to changes in law and policy that affect them:

“[I] think if we, as groups of people, can be more energised to get behind a CEO and not just see ourselves as just coming to a meeting and looking at reports and say, that’s very good and then off we go until next time. What can we do to promote this, what can we do to better this, what can we do to support what’s going on? That would help us as a group of people who sometimes get a bit fed up with coming to meetings” (005).

Our findings suggest that despite the sense of commonality to how one should distinguish between governance and management, and the trustees’ predisposition to the former, the interviewees have had multiple and divergent experiences of what trustees do; what it means to be responsible for the governance of a voluntary organisation and the extent to which the governance-management divide is always clearly demarcated in practice.

(iii) What is it like to be a Trustee?: commitment and value

Attention to the meaning of trusteeship and what trustees do belies the more mundane but nonetheless important aspects of what it is like to be a trustee: the commitment of others on the board and whether individuals feel that their contribution is valued. The experiences our interviewees had of being a board member were intrinsically connected to their perceptions of how committed other board members were. Some interviewees underlined the sense of confidence that their perceptions of the skills and commitment of others gave them in their board. One stated: “I’m not comfortable understanding all the detail of the finances, but I’m comfortable that we’ve got a Board member who’s obsessive about it” (007).

By and large, the discussion of the commitment of the board was about practicalities; whether an individual attended meetings and whether individuals came to meetings prepared. The interviewees were mindful of the governance challenges facing their organisation, issues such as the diversity of their boards and the governance scandals that have dominated discussion in the UK charity sector in recent years. But it was the small things that often mattered to them and shaped their experiences. This reflects Cornforth’s (2001: 225) finding that the level of board members attendance at meetings was the only one of a number of structural factors that correlated with perceptions of what makes a board effective. Some interviewees believed that the role of the Chair was crucial in this respect (Harrison et al., 2012). One interviewee, dissatisfied with his/her Chair, underlined that the Chair has a duty to follow up with board members who had been absent for a time and to ensure that meetings and processes were inclusive of all trustees (003). Through exploring issues that irritated our interviewees, we gain insights into what it is like to be trustee that cannot be captured by an interpretation of roles alone. In the broadest sense of the term, these are indicators of volunteer satisfaction and interlinked with whether trustees believed that their contribution was valued.

A questioning of whether their contribution was valued was particularly apparent in individuals who brought to the Board either professional or personal experience (or a mix of both), but not necessarily business and financial skills. An interviewee who had many years of experience as a medical professional appeared to have begun to question his/her value to the board given that “it’s become apparent to me that I am not au fait enough with the way that business life is now.” S/he also appeared to suggest that those with business acumen had roles that were distinct from his/hers and were of fundamental, if not more importance to the governance of the charity:

“I’ve always seen my role, I’m so unlike the businessmen and those sort of things. I find that sort of thing beyond me really, apart from the little bit I’ve learnt. But they know and I know you couldn’t trust me to be in charge. So, I’m there for, I don’t know ... what I have been as a doctor I think, having spent my entire life with children” (006).

Where individuals feel that their contribution is undervalued, the experience of being a volunteer can be negative (Talbot, 2015). As a final question, all participants were asked to articulate what being a trustee meant to them. The answers were overwhelmingly positive but taken in the context of the overall volunteer experience belie some of the tensions and challenges that one needs to negotiate in terms of what it is *like* to be a trustee.

Discussion and Conclusion

This research underlines three core elements of the trustee volunteer experience in the context of the complex social and political arena facing learning disability charities: what it means to

be a trustee; what trustees do; and, what being a trustee is like. Our research emphasises “what is going on in trusteeship?” Drawing further upon the work of Michael Saward (2010, 2009, 2006) and framed by the three aspects of the volunteer experience, we now discuss how the moral principles that inform what being a trustee means give rise to competing claims about how the fiduciary and common good principles can and should be served. Roles, as the pragmatic expression of what trustees do, can be viewed as resources which can be drawn upon to substantiate claims about how the interests of the charity are best addressed. More informally, commitment and feeling that one’s contribution is valued can also be articulated to shape, bolster, or, indeed to undermine claims made by trustees. Across the different facets of the trustee experience, it is possible to discern how our understanding of trusteeship is made and remade through representative claims.

In terms of the fiduciary principle, a trustee (maker) presents him/herself (subject) as loyal to the charitable cause (object). The competing bases to this claim create different interpretations of what the principle means and what should underpin claims to uphold it: does a sense of empathy and a willingness to learn about the cause suffice, or does someone need an innate understanding or experience of the charitable cause? There is also a tension in terms of the audience(s) that the claim addresses. The intended audience for trustee claims regarding the fiduciary principle are the charity’s stakeholders, including beneficiaries served by the charitable cause, to whom trustees wish to convey their loyalty to the cause. However, making a claim to know what is in the best interests of beneficiaries of the charity appears divorced from the emphasis that the Disabled People’s Movement places on ‘expert by experience’ and the empowerment, voice and rights of disabled people in service-user involvement (Beresford and Campbell 2006: 186; Beresford, 2003). Disabled people can also be viewed as an *actual* constituency. As the Disabled People’s Movement’s challenge to the medicalisation of

disability suggests, they recognise claims being made about them and may respond to these claims (Saward, 2010: 49). Those responsible for charity governance, in particular the control of resources have been a focus of the critique of charities (Drake, 1996; 1994). Our research shows how when we see trustees as makers of representative claims, we also gain a critical appreciation of how they can both make *and* challenge established expectations of what it means to be a trustee. By arguing for the importance of experience, or the need for more people with learning disabilities on boards of trustees, and resources to support this, they can be seen *as part of the critique of charities* and their relationship to disabled people, rather than a focus of it. However, there is a practical dimension to their potential to do so that needs to be acknowledged. The Mental Capacity Act Code of Practice was not mentioned specifically by our interviewees, but, it suffices to assume that questions about autonomy and capacity raised by legal academics are relevant to addressing concerns about resources and some cautiousness expressed by interviewees. This is a specific area that warrants further investigation. To think of the fiduciary principle as something that trustees have a responsibility to uphold, and something that they do, belies the extent to which what it means to be a trustee also involves critical engagement with perspectives about how and in what ways volunteer trustees *can* and *do* fulfil this moral responsibility.

Regarding the common good principle, a trustee (maker) presents him/herself (subject) as having the appropriate aptitude and ability to know how to ensure that the charity (object) acts in line with moral and ethical expectations of society, and arguably of the law. The trustee's responsibility for governance over management is articulated clearly by our interviewees. As roles are resources through which skills and abilities can be demonstrated, roles become the bases of representative claims. Viewed in isolation as a feature of the trustee volunteer experience, our findings reflect those of other studies about how trustees have to manage the

tension of being involved in the charity and being an impartial observer and assessor of it (Harrow and Palmer, 1998: 174). Trustees were not ambiguous about the nature of their role. But equally, roles were not taken as a given but rather as something to be (re)negotiated and (re)interpreted (Cornforth and Macmillan 2016). For example, some of our participants suggest that trustees should be more involved in the charity beyond the governance responsibilities performed through and by the board. The ways in which they manage tensions; take on, or make the case for more involvement on a day-to-day basis can be used as resources to create new expectations of trustees, altering what it means to be a trustee in the process. The performance of the role becomes the resource they use to substantiate a claim and becomes part of the re-articulation of what it means to be a trustee and what trustees do.

Beyond the nuances of roles, our findings also suggest how the experience of being a trustee is about 'face to face interaction' and that 'trust, sharing and understanding' are salient to this (Lu and Schuett, 2014: 69). According to Smith (1992), commitment is an assumed feature of trusteeship. When talking about the importance of an individual's commitment, our interviewees present a particular conception of a core characteristic of an individual, which could form the subject of a representative claim. However, our findings also illustrate how there is an expectation that this is clearly demonstrated. The ways in which one shows that one is committed can also be interpreted as a resource through which an individual supports claims they make to uphold the fiduciary and/or common good principles. It also forms a basis to the character and connotations of trusteeship. Finally, an additional dimension to what being a trustee is like concerns whether an individual feels that their contribution to the board is valued. We know from the analysis of the prioritisation of certain roles by boards that they are vulnerable to external and internal contingencies (Ostrower and Stone, 2010; Guo and Brown, 2010; Cornforth, 2001). Metcalf (2013: 400) argues that a fundamental question is the extent

to which what it means to be a trustee is affected by the external economic and political environment. The perception amongst some of our interviewees that some skills and experiences have more value than others suggests that future research might consider how and why some representative claims gain dominance and, in turn, (re)make how we understand, and arguably what we expect trustees to be like, as well as the implications this has for board dynamics and effectiveness.

In conclusion, we call for future research to build upon this study through engagement across the charity sector on the meaning of trusteeship to trustees and to further explore the experiences of volunteers who are trustees. The principal contribution of this article to the literature on charity governance lies both in the focus on the trustee volunteer experience and, drawing upon the Saward's conceptualisation of representative claims, the novel perspective it brings to the analysis of the trustee experience: what it means to be a trustee; what trustees do and what being a trustee is like. Taken at face value, the meaning of trusteeship is such that is anathema to much of what the Disabled People's Movement challenged, indeed detested about charity. Viewed as a more dynamic phenomenon based on competing and contestable representative claims, it is possible to see how trustees can be part of challenging the status quo as part of how they lay claim to what it means to be a trustee of a learning disability charity.

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There is no conflict of interest to declare.

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Table 1: Trustee Participants by Organisation

Organisation	Size*	Interviewee
Multiple Service provider	Major	001, 004, 006, 010
Advice, support and Training	Medium	002, 003, 005
Arts and Cultural organisation	Medium	007, 008
.		
Social Care services and support	Medium	011, 012
Family Support and Respite	Medium	009, 014
Peer Support	Small/	013
For Adults with Learning Disabilities.	Medium	

*Size of organisation has been classified in accordance with the National Council for Voluntary organisations (NVCO) classification of voluntary and community organisations:,
<https://data.ncvo.org.uk/a/almanac12/methodology/>

ⁱ “Object” denotes the maker’s interpretation of, in this case, the charity. “Referent” is a broader term to denote other characteristics of the charity which are not articulated by maker of representative claim.

ⁱⁱ <https://www.charitychoice.co.uk/charities/health/disabled?onlinedonations=0>

ⁱⁱⁱ <https://www.gov.uk/government/publications/finding-new-trustees-cc30/finding-new-trustees>

^{iv} We are grateful to the chief executive of a charity that works with people with learning disabilities for this point, which arose as part of a discussion of our research findings.

^v <https://www.mencap.org.uk/blog/whats-it-be-trustee>