

SMK with Governance & Leadership: trustee attitudes survey

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About the results

**Survey conducted between
21 August and 25 September
2023**

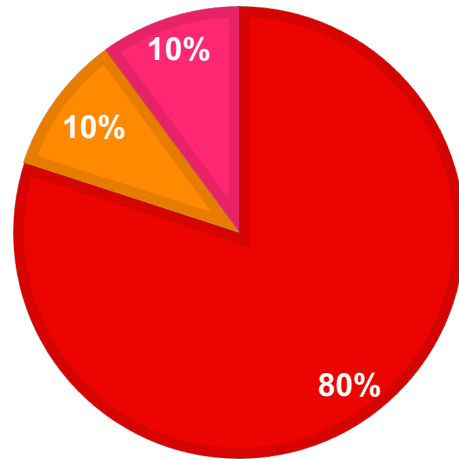
165 respondents

How charity leaders should speak out

NB Percentages may not total 100% as figures have been rounded to a whole number and where participants were able to select more than one answer

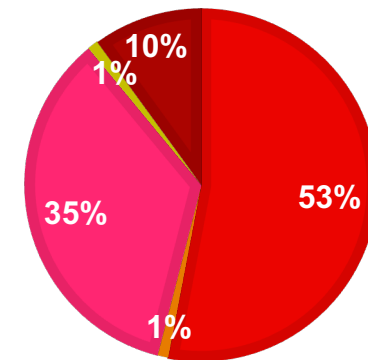
Would you like to see more charity CEOs have a public profile and take part in public discourse?

■ Yes ■ No ■ Don't know



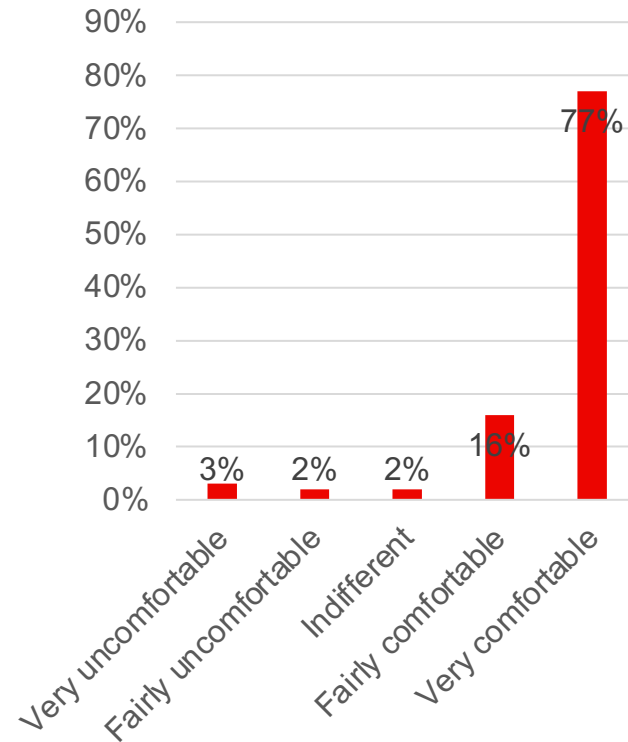
How far do you agree that a CEO's engagement in wider public discourse can be an effective way for a charity to achieve its mission and goals?

■ Agree strongly ■ Disagree strongly
■ Agree somewhat ■ No opinion
■ Disagree somewhat

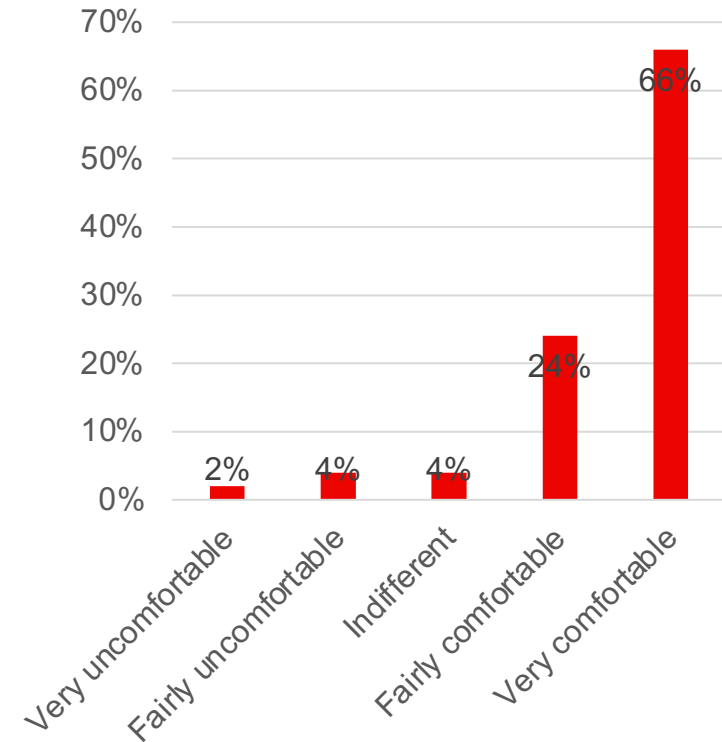


On a scale of 1 to 5, how comfortable are you with the idea of your charity's CEO commenting publicly on issues that:

Are directly linked to your charity's work

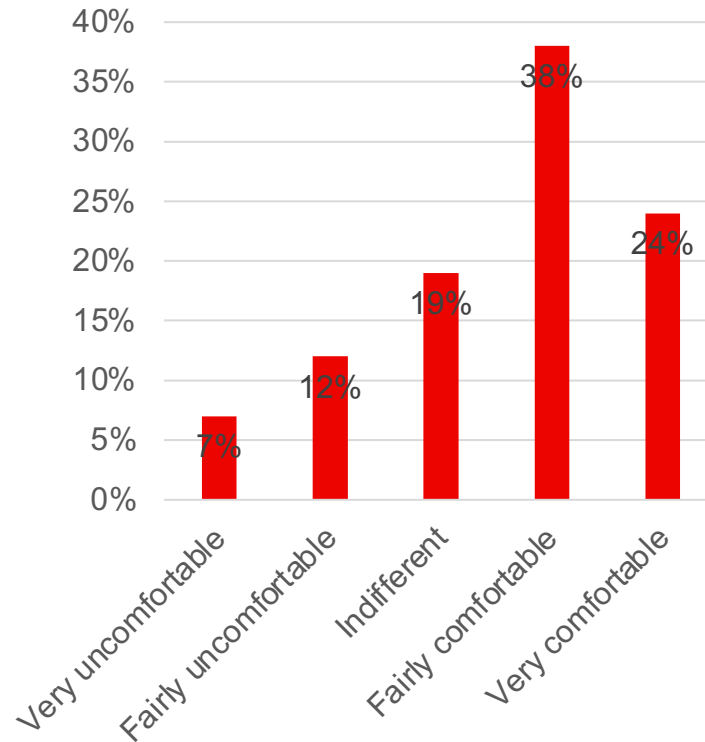


Speak to the wider underlying causes and/or effects of your charity's work

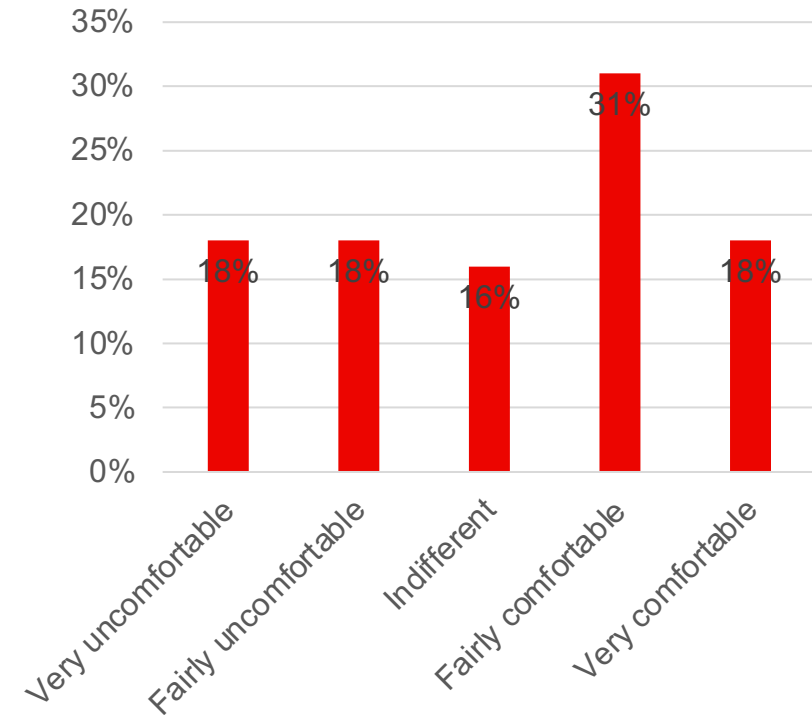


On a scale of 1 to 5, how comfortable are you with the idea of your charity's CEO commenting publicly on issues that:

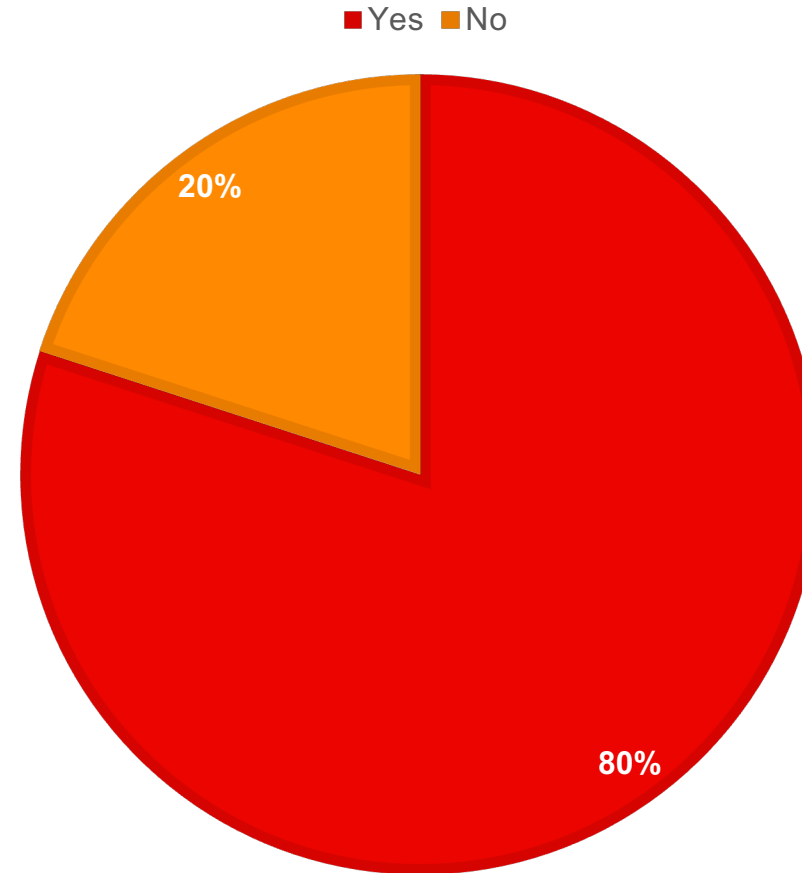
Any topical issue of the day, provided some link can be made to your charity's work



Any topical issues of the day if required – say if asked to take part in a current affairs programme such as Question Time

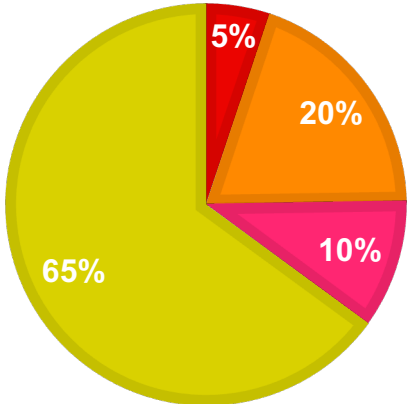


Do you think it is legitimate for a CEO to speak not just on behalf of their current organisation but also drawn from their wider professional experience?



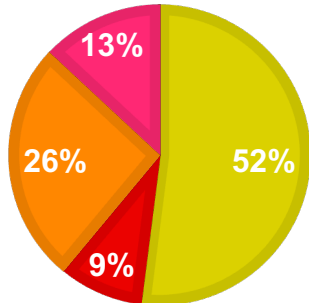
Has your board agreed boundaries for the extent to which your CEO is encouraged/permitted to comment in public?

- Yes - but they're not at all clear
- Yes - they're somewhat clear
- Yes - they are very clear
- No - this has not been discussed



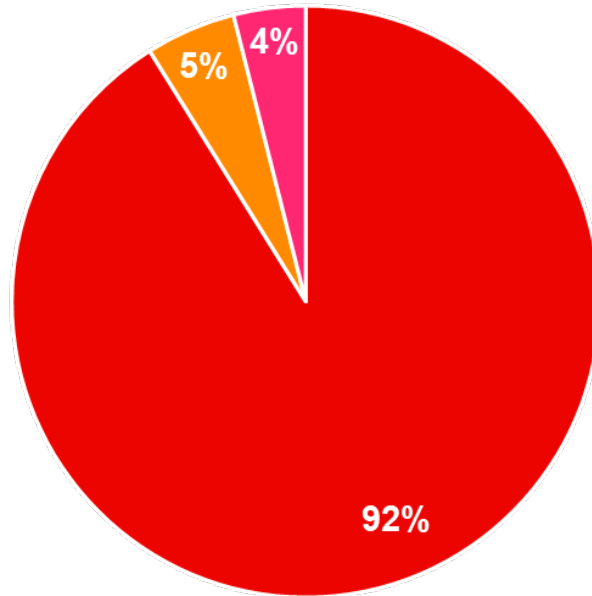
Has your board agreed boundaries for the extent to which your CEO is encouraged/permitted to comment in public? (campaigners only)

- No - this has not been discussed
- Yes - but they're not at all clear
- Yes - They're somewhat clear
- Yes - They are very clear



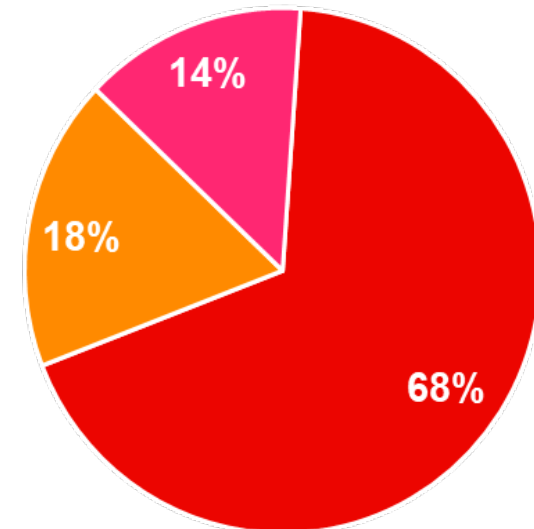
Do you think it's right for your CEO to talk about your charity's engagement in society-wide challenges like equality, diversity, and inclusion (EDI)?

■ Yes ■ No ■ Don't know

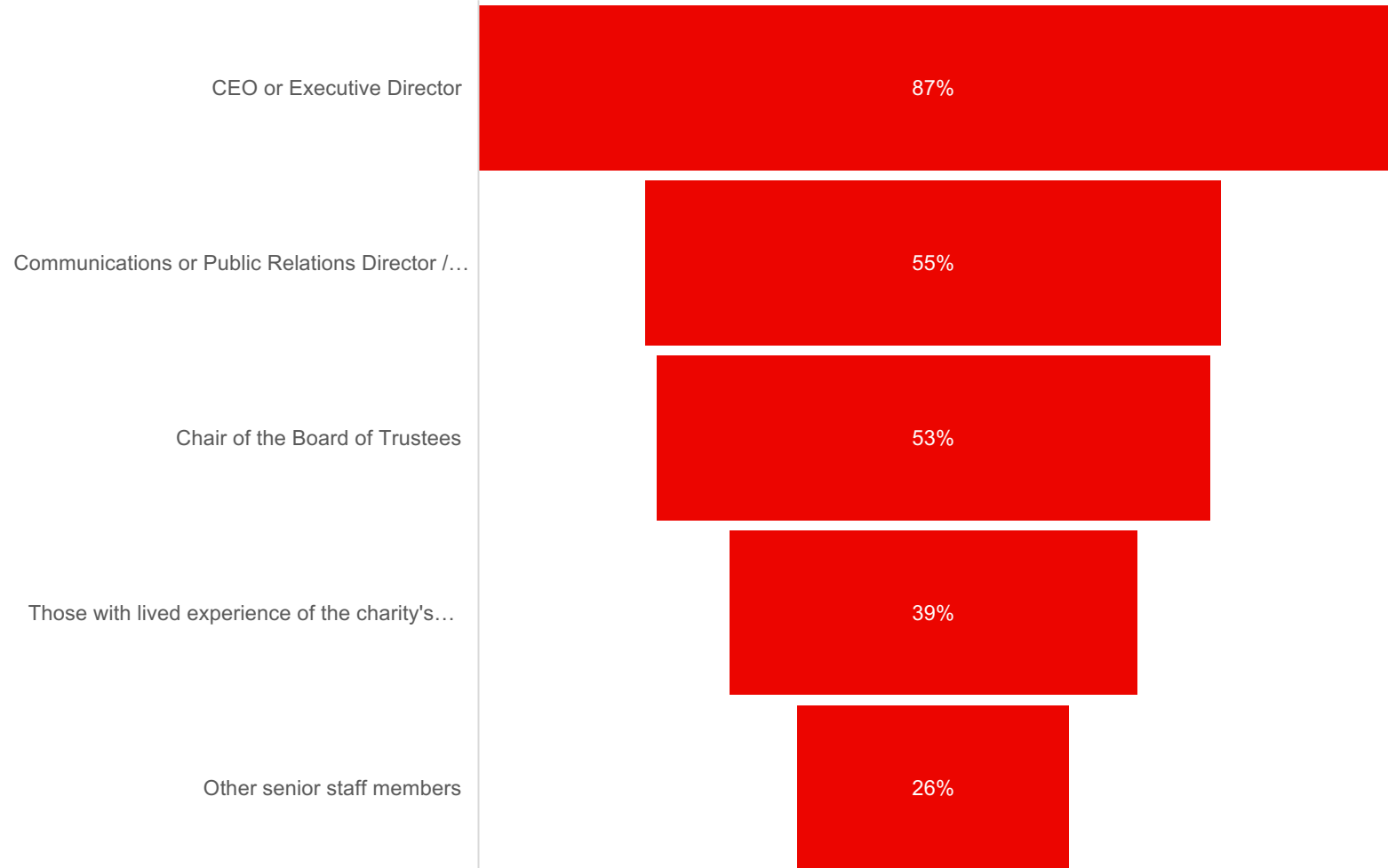


Do you think it's right for your CEO to talk about their own experience of society-wide challenges like equality, diversity, and inclusion (EDI)?

■ Yes ■ No ■ Don't know



Who within your charity do you think should be the primary spokesperson or spokespeople when engaging in public discourse? (Please select all that apply)



What respondents had to say:

“I really don’t like restricting anyone's freedom to express their views, but a CEO has to be aware of their wider responsibilities to not jeopardise the charity's ability to fulfil its mission. For my charity, this has never been a problem, but I can see that should a CEO express certain (problematic) views that having guidelines and a clear policy would be essential. Something that we need to look at.”

“All these answers about 'who' are of course dependent upon context, content and audience. We have clear boundaries, roles and responsibilities and a culture of trust and open communication – we discuss who says what to whom and where personal life and opinions of Director separate from professional role and legal implications for org and Board.”

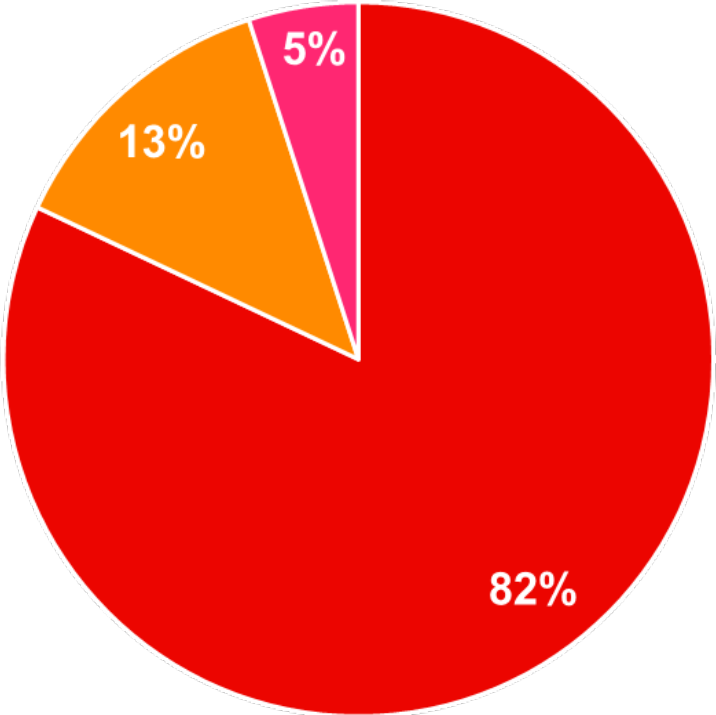


Charity campaigning

NB Percentages may not total 100% as figures have been rounded to a whole number and where participants were able to select more than one answer

Do you believe campaigning is a vital function for charities?

■ Yes ■ No ■ Don't know



Percentages may not total to 100% where figures have been rounded to one decimal place.

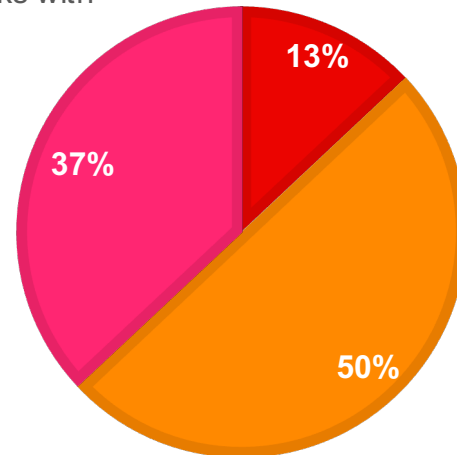
Which of the following would you see as legitimate charity campaigning activity?

[Select all that apply]



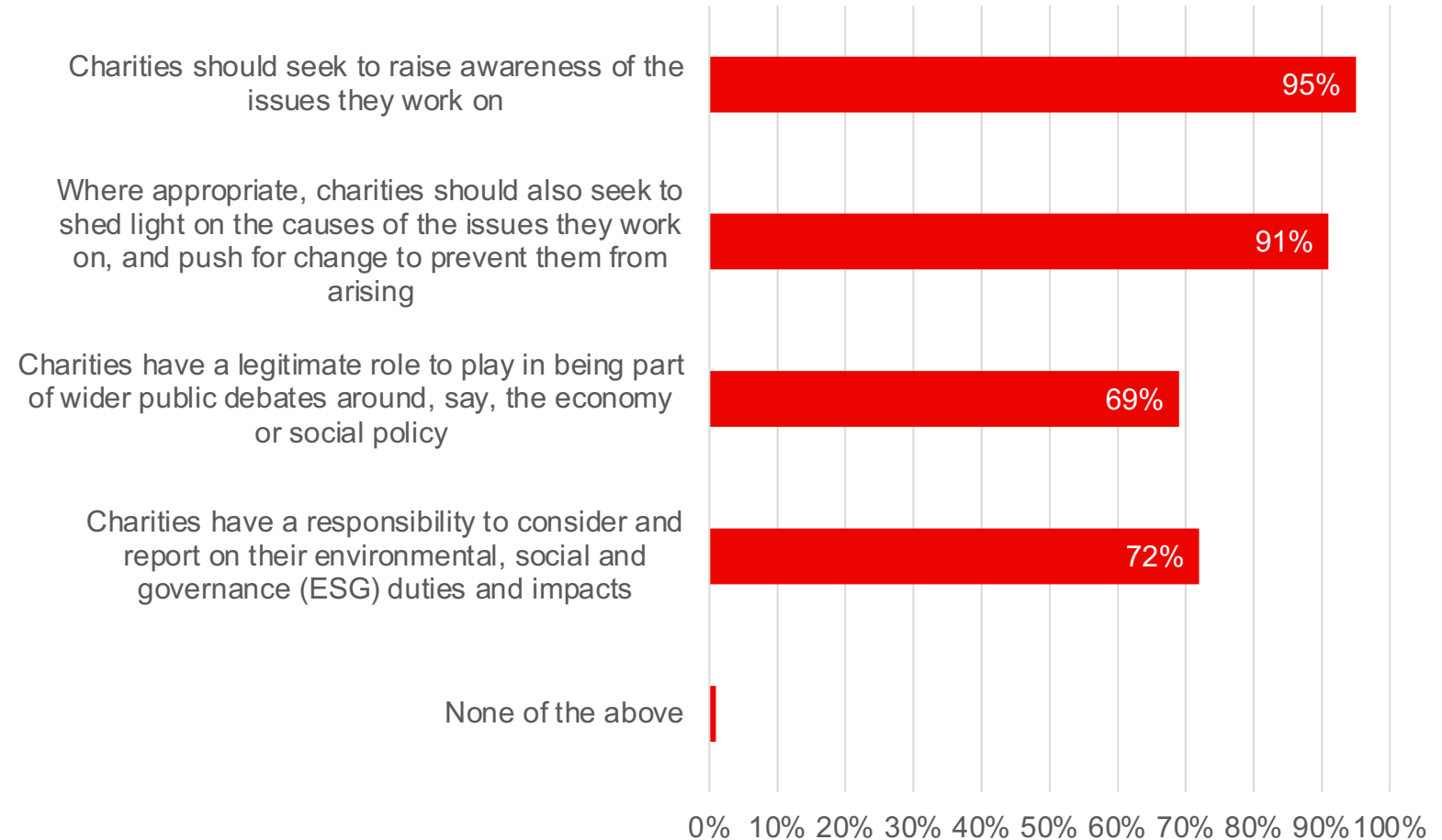
Which of these most closely matches your own personal view?

- Charities should only work to meet the need they were established to address (e.g. by providing services to individuals and communities, or by providing amenities)
- Charities should be able to undertake advocacy, influencing or campaigning if it's necessary to achieve its mission (e.g. a food bank should be able to have a view on the causes of poverty)
- Charities should be able to speak out on any issue that affects the people or communities it works with



Which of the following statements do you agree with?

[Tick all that apply]



What respondents had to say:

“Some of my answers are influenced by the thought that CEOs should not become seen as 'rent a mouth' type figures in the media , they should target their statements to serve their constituency whilst working with other CEOs to highlight the need to address underlying causes. Less is sometimes more in terms of raising your voice:

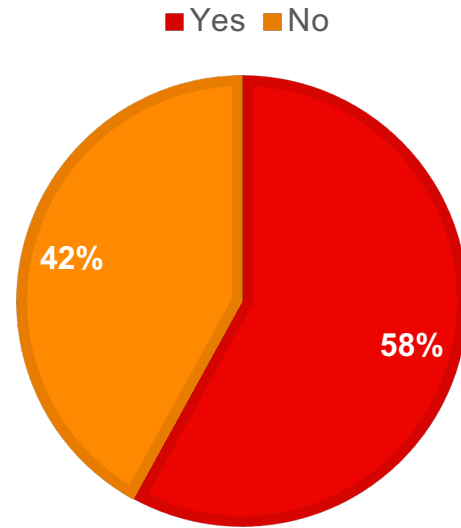
“Having been a trustee and CEO in several organisations , I think a lot depends on the person concerned and their knowledge and attitudes. Some I trust, others less so.”



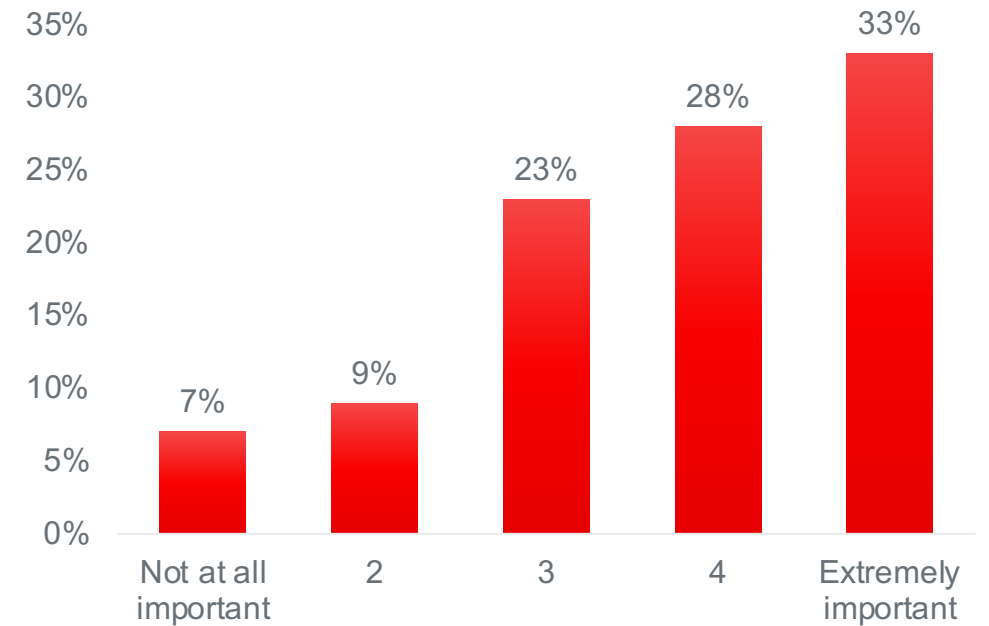
Thinking about a charity you're currently involved with as a trustee

NB Percentages may not total 100% as figures have been rounded to a whole number and where participants were able to select more than one answer

Does your charity undertake any campaigning?

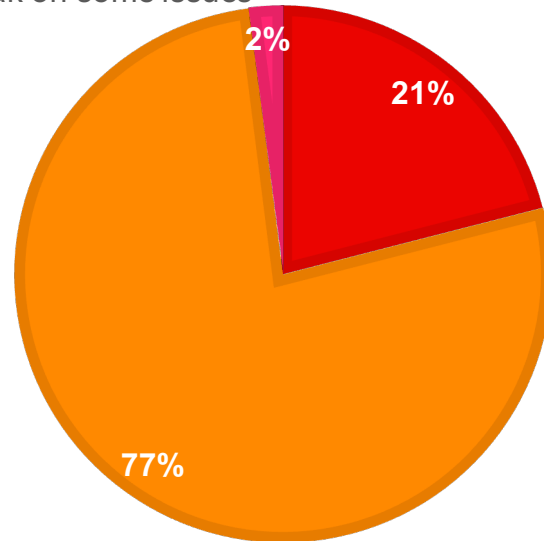


On a scale of 1 to 5, how important do you think campaigning is in advancing your charity's mission?



How does your charity interpret the boundaries of legitimate campaigning?

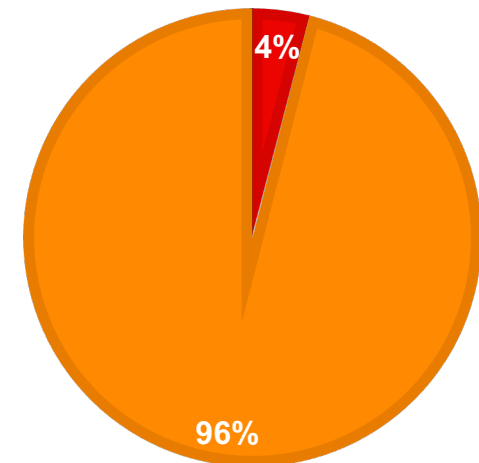
- Too narrowly - I think there are issues we should or would like to speak about
- About right - I think we speak about the issues that are necessary
- Too broadly - I think that we over reach when we speak on some issues



How does your charity interpret the boundaries of legitimate campaigning?

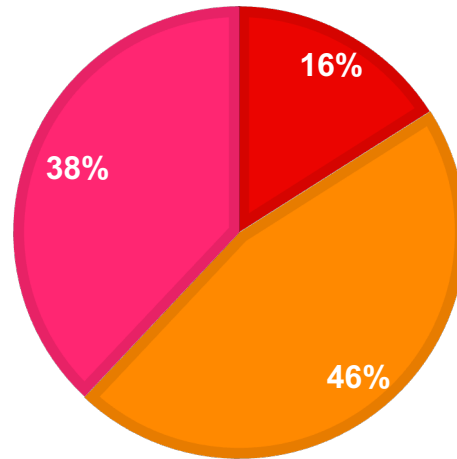
(of those who said their charity undertook campaigning)

- Too narrowly - I think there are issues we would like to speak out about
- About right - I think we speak about the issues that are necessary



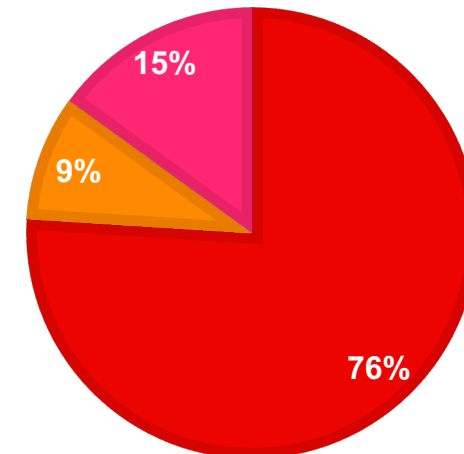
Do you think your organisation's Board is too risk averse in its approach to campaigning?

■ Yes ■ No ■ This has not been discussed



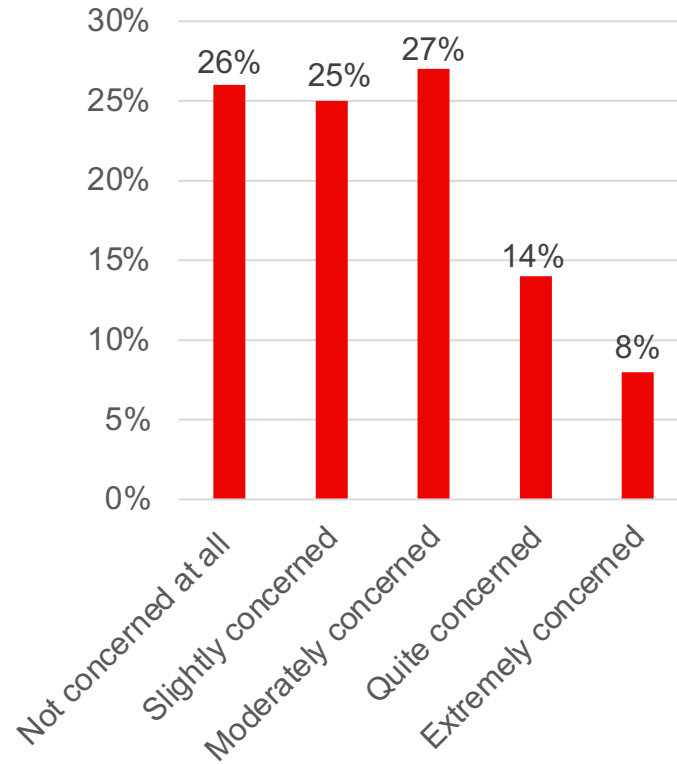
Do you think it would be helpful if there were frameworks or tools to help trustees develop and manage their approach to campaigning and speaking out?

■ Yes ■ No ■ Don't know

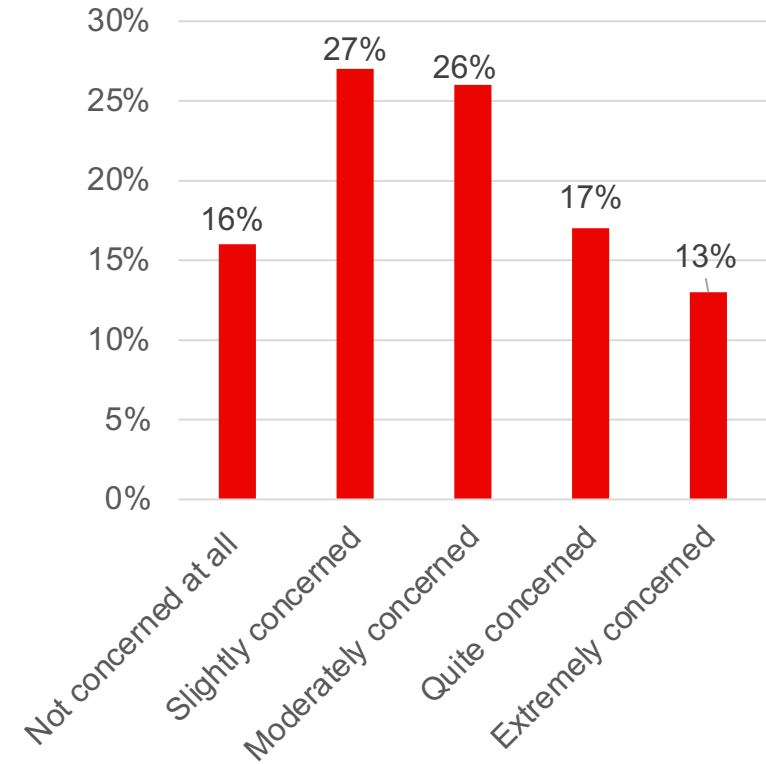


On a scale of 1 to 5, if your charity decided there was a benefit to speaking up on a certain issue, how concerned would you be that the benefit would be outweighed by risk of:

Attacks from politicians

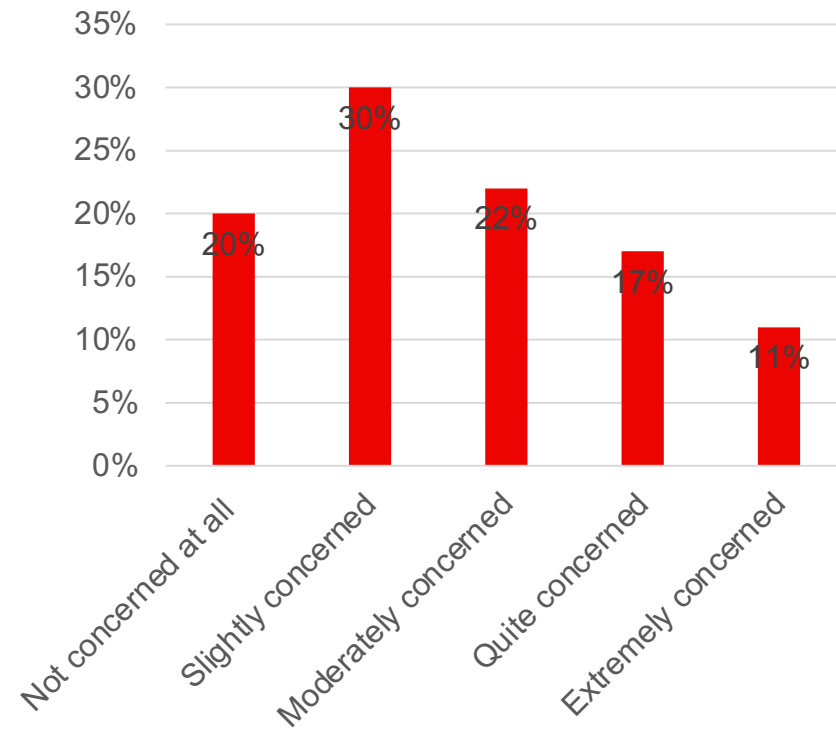


Attacks from the media

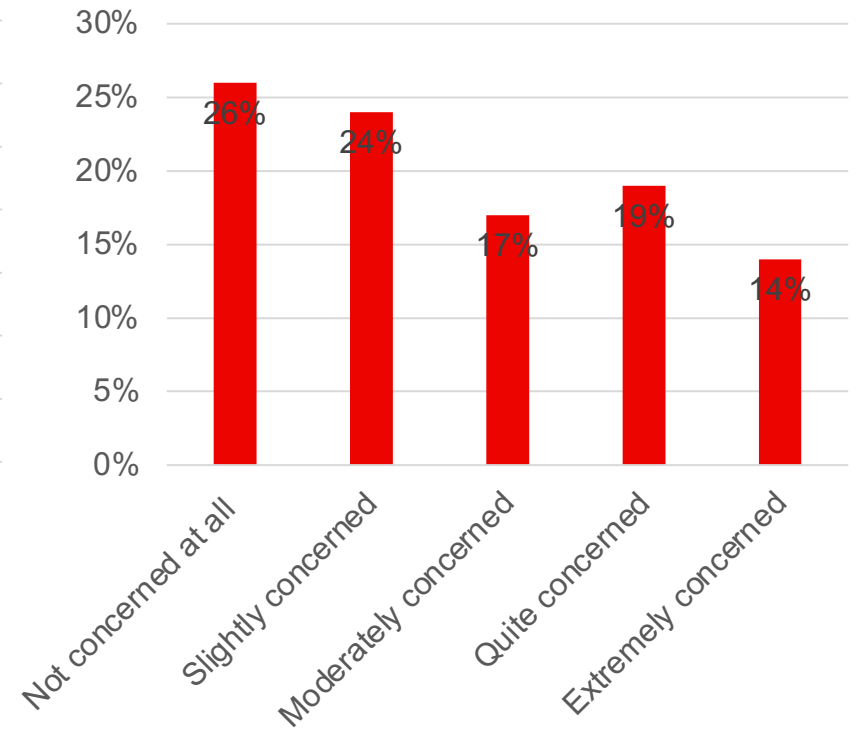


On a scale of 1 to 5, if your charity decided there was a benefit to speaking up on a certain issue, how concerned would you be that the benefit would be outweighed by risk of:

A lack of support / loss of income from individual donors

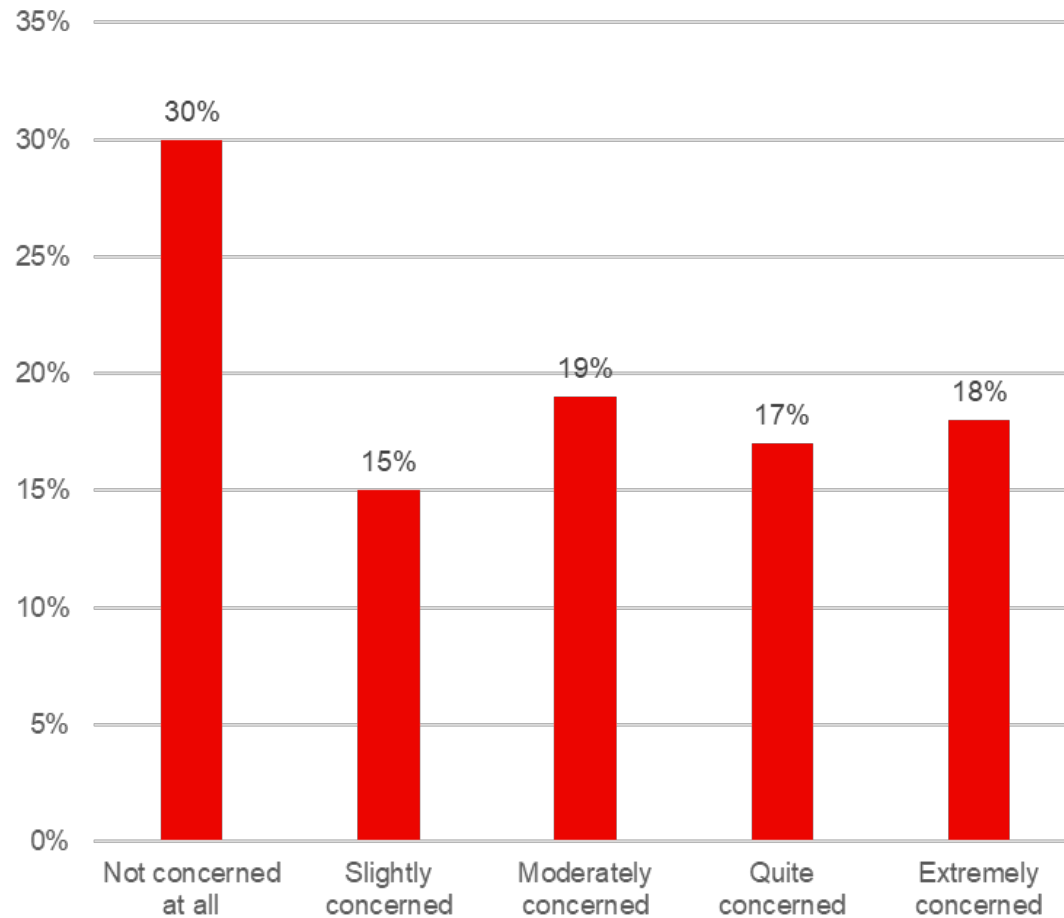


A lack of support/loss of income from public funders (government/arms-length bodies)



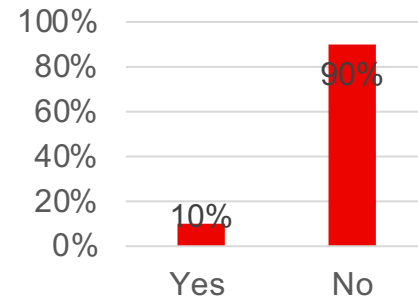
On a scale of 1 to 5, if your charity decided there was a benefit to speaking up on a certain issue, how concerned would you be that the benefit would be outweighed by risk of:

Lack of support from people affected

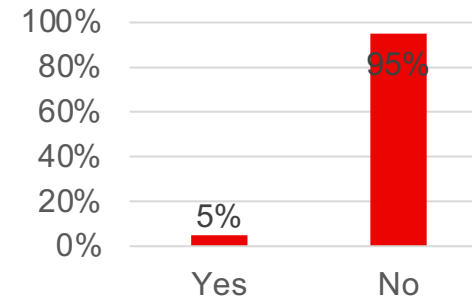


To your knowledge, has your charity faced criticism or backlash from any of the below in response to its campaigning?

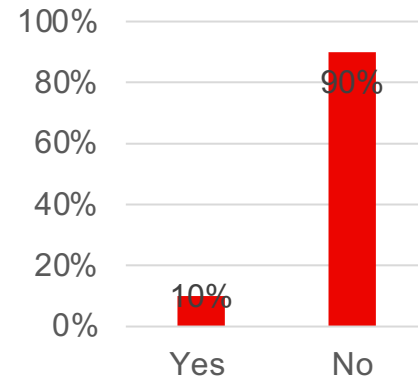
Funders / donors



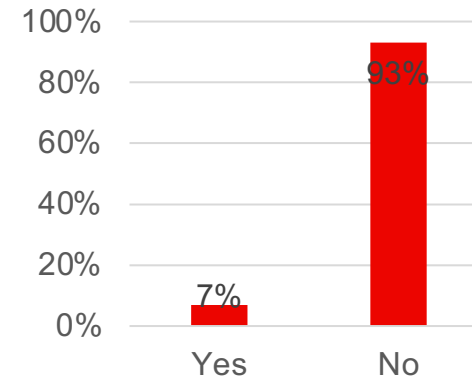
Regulators



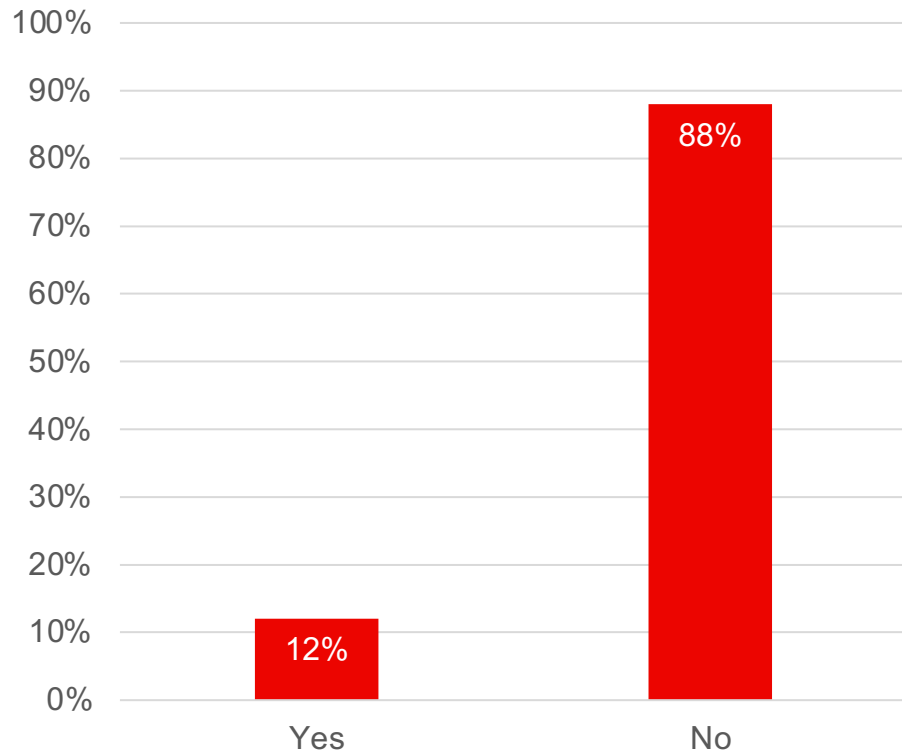
People affected



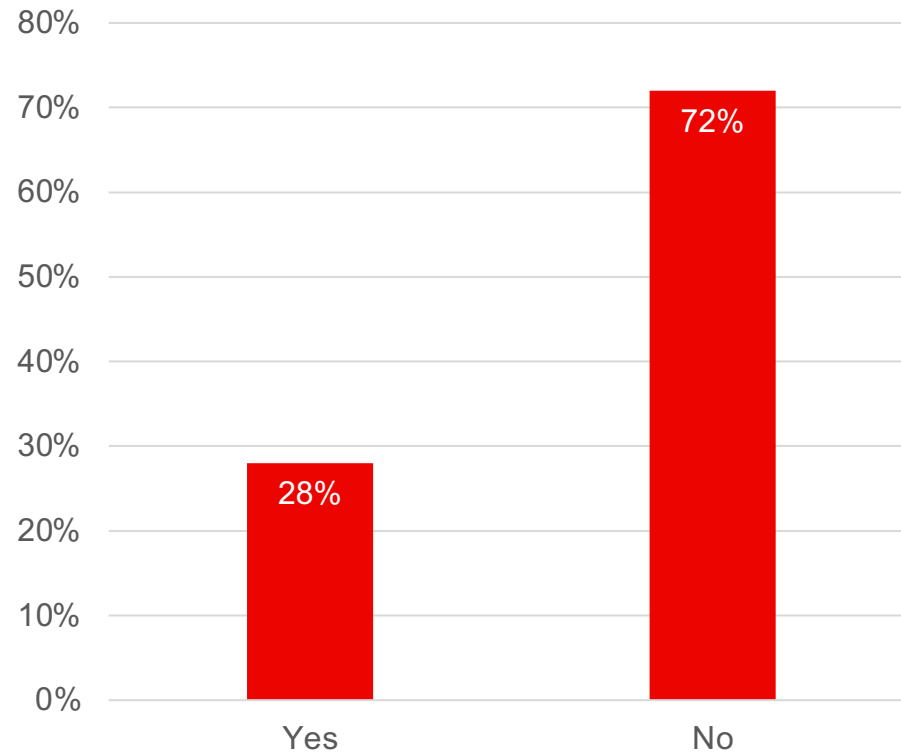
Other



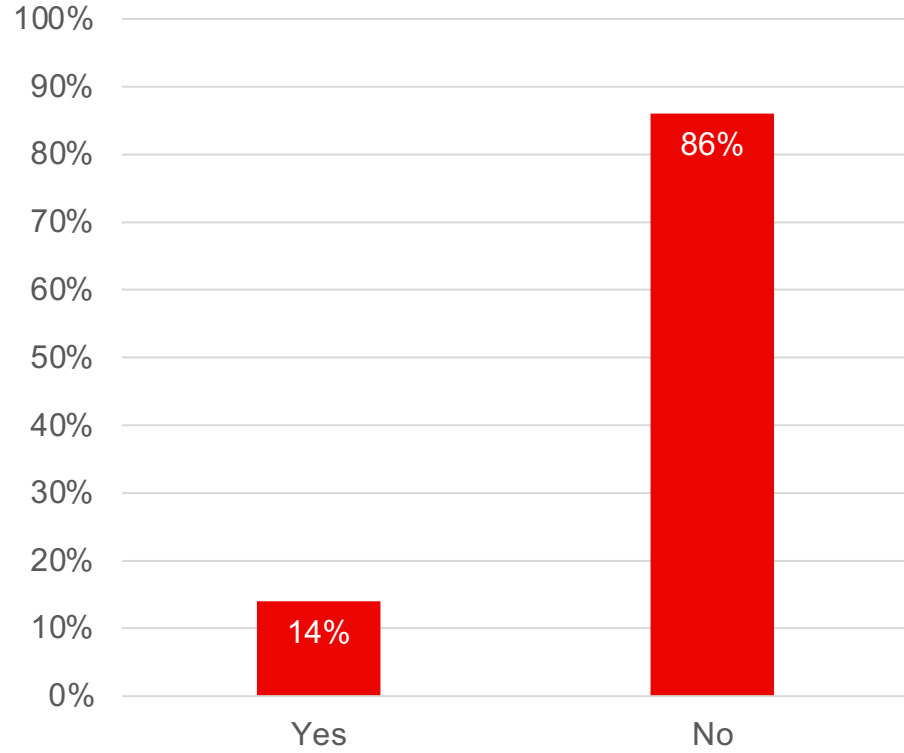
Politicians (all responses)



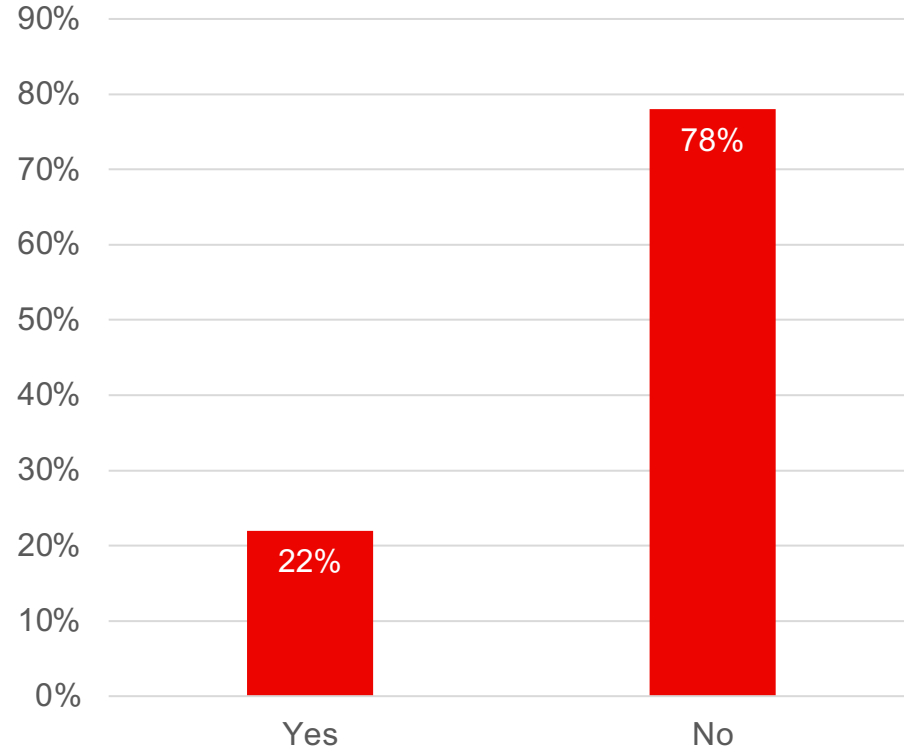
Politicians (campaigner only responses)



Media(all responses)

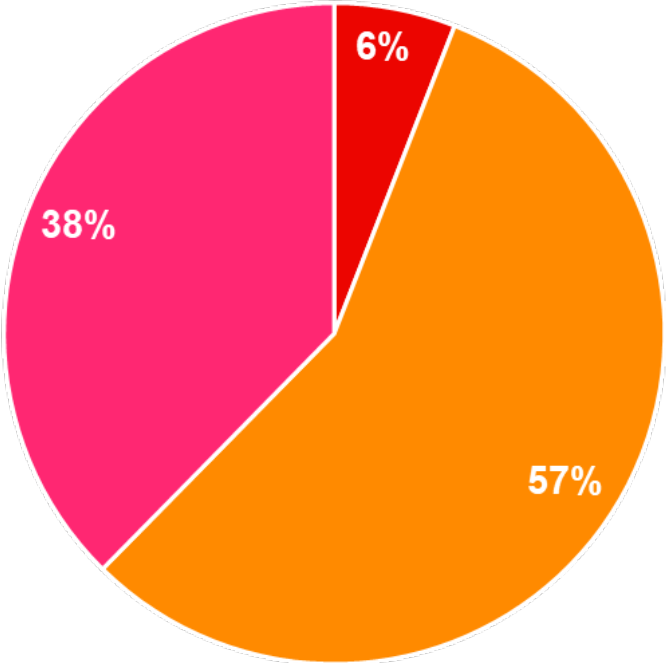


Media (campaigner only responses)



Has your organisation ever been asked to sign a non-disclosure agreement that would have impeded your ability to speak publicly on issues important to you?

■ Yes ■ No ■ Don't know



What respondents had to say:

"Lack of high-profile politicians reiterating charities' right to campaign [is an issue]. Unfortunately, even if the regulator reiterates this message, we need some right-wing MPs onside about campaigning (and free speech) to state the importance of this principle in opposition to the MPs who state the opposite. A Charity Commission press release clarifying the issues will never get the same airtime as a reactionary MP, so we need MP reactions which support campaigning too"

"The risk of an ill-informed public and media backlash seems much higher than it used to be. If you don't have an experienced comms/external affairs/policy team this can be a real barrier to speaking out. There is risk from donors/Government, but I think that is easier to manage."

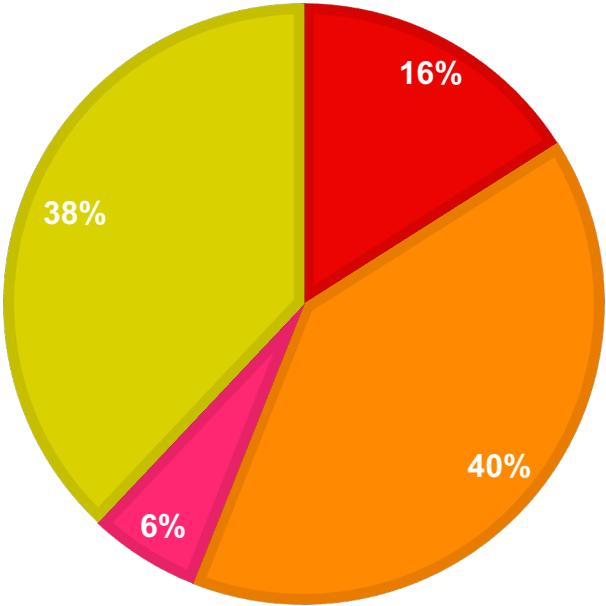


The Charity Commission and the regulatory environment

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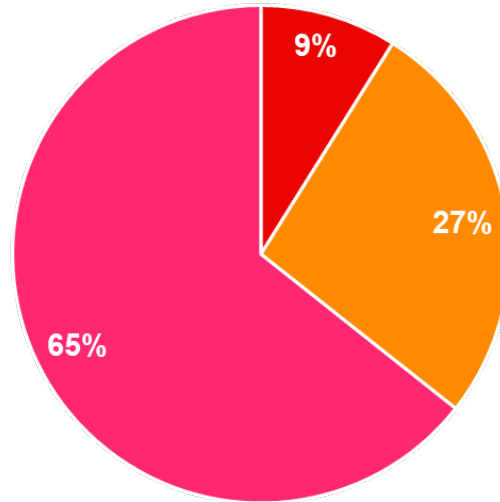
Which of these statements best describes your view of the Charity Commission's guidance on charity campaigning?

- The guidance is very clear
- The guidance is open to interpretation
- The guidance is not at all clear
- It's not an aspect of charity regulation I'm familiar with



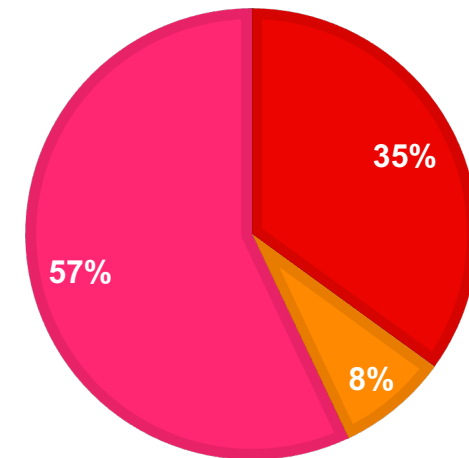
Do you think the Charity Commission's formal guidance and public commentary on campaigning match up?

■ Yes ■ No ■ Don't know



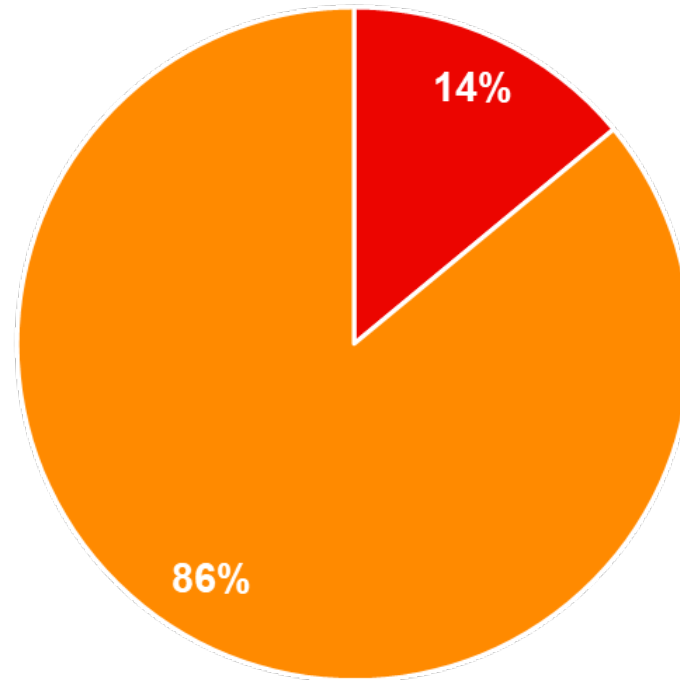
Do you think the Charity Commission's stance on charity campaigning has become more or less positive over the last ten years?

■ Less positive ■ More positive ■ Don't know

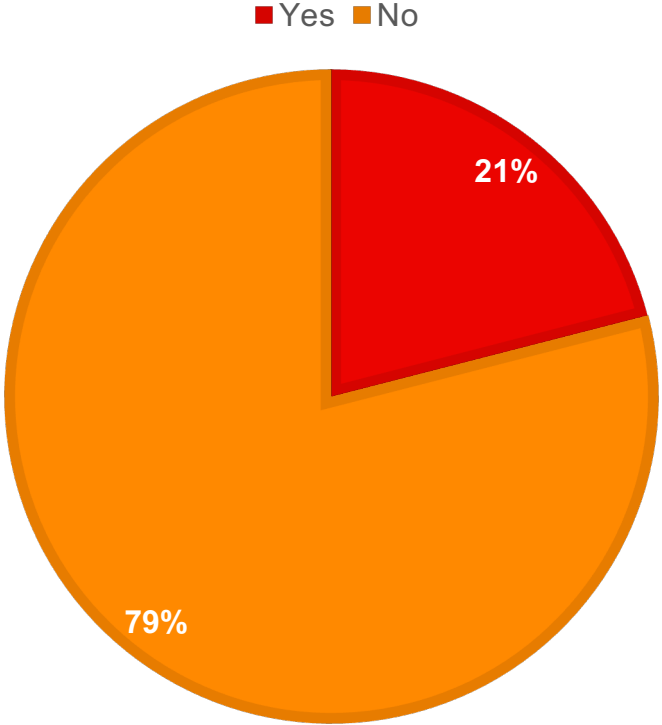


Have you ever sought legal advice, reached out to the Charity Commission, or approached another organisation in order to better understand how your charity can speak out on certain issues?

■ Yes ■ No



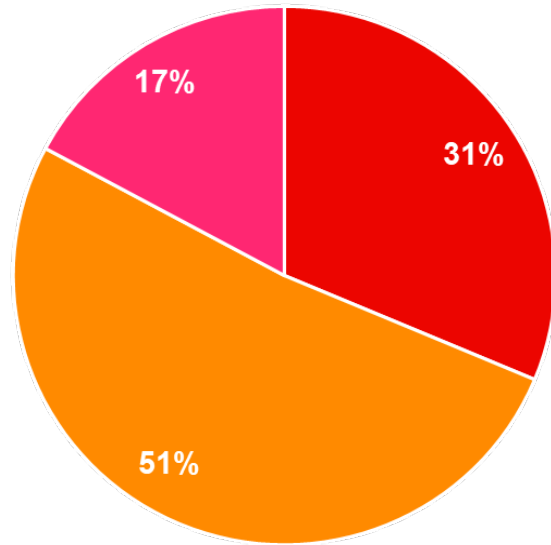
Did you know the Charity Commission now suggests having a policy on 'campaigns and political activity'?



Does your charity have a policy on 'campaigns and political activity'?

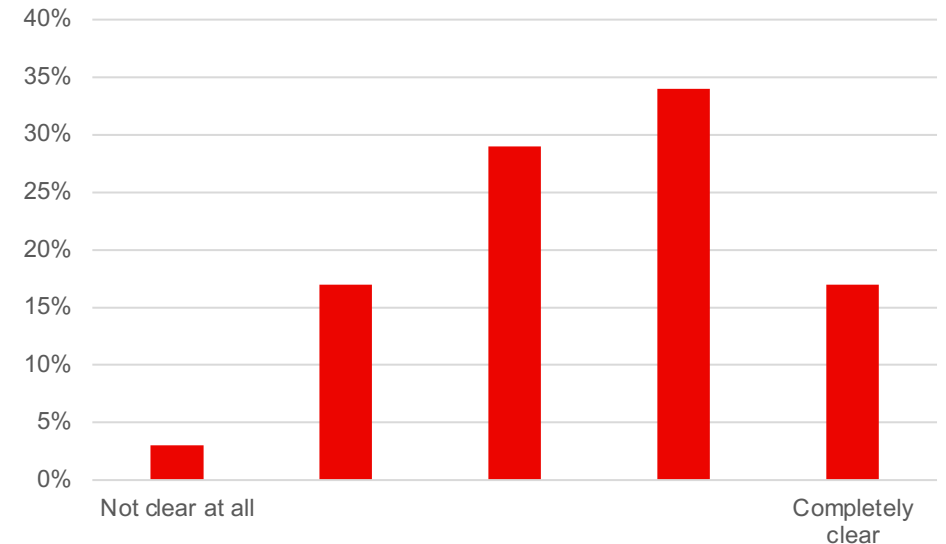
(Only includes respondents who knew a campaign policy was recommended)

■ Yes ■ No ■ Don't know



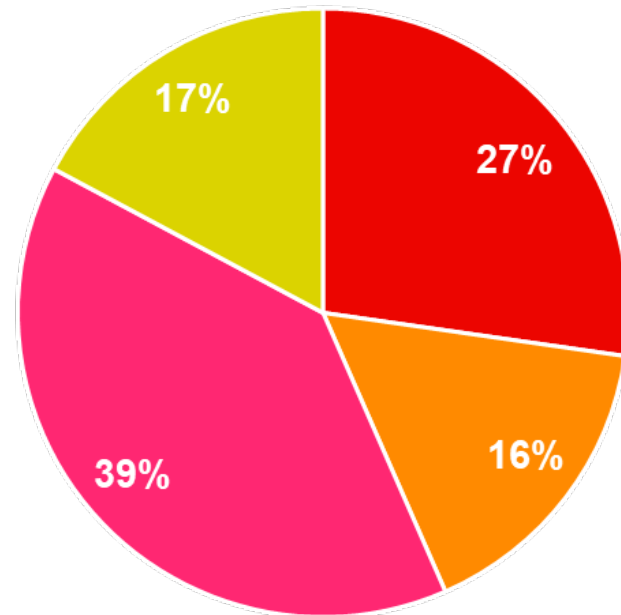
Thinking about a 'campaigns and political activity' policy, how clear are you on what it should include? (on a scale of 1 to 5, with 1 being 'not clear at all' and 5 being 'completely clear')

(Only includes respondents who knew a campaign policy was recommended)

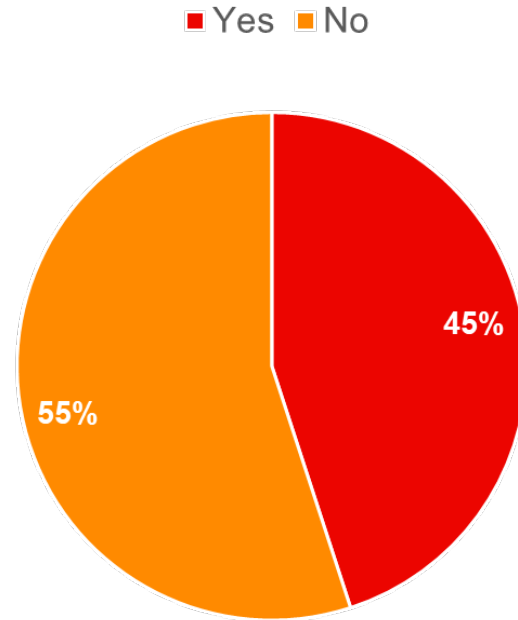


Do you think that implementing a campaigning policy or similar, clearly setting out the parameters for who can speak out and on what basis, would be liberating or restrictive?

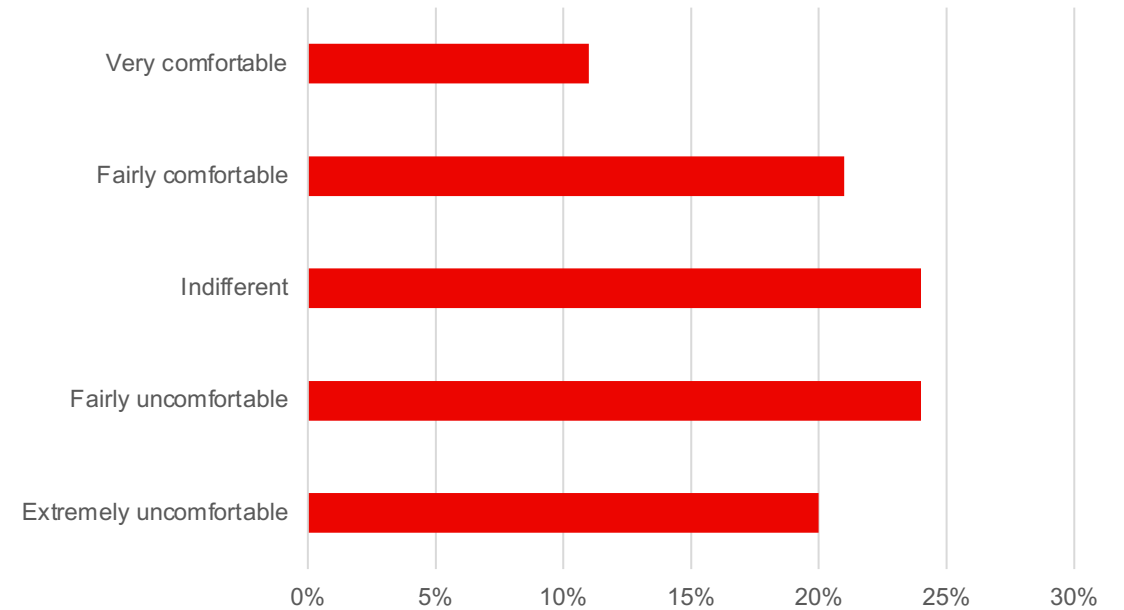
- Liberating
- Restrictive
- Neither liberating nor restrictive
- I don't know



Are you aware that the Charity Commission will be issuing new social media guidance?



In considering a policy on social media use for your own organisation, how comfortable are you (or would you be) about restricting senior staff from expressing personal opinions on their own social media accounts?

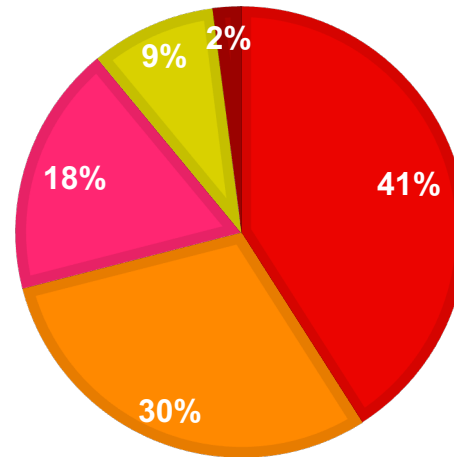


About our respondents

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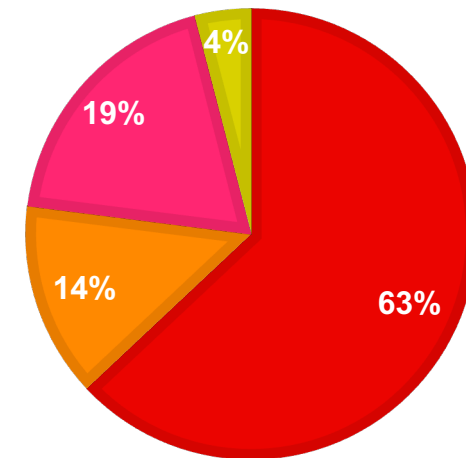
What is your charity's annual income?

■ < £1m ■ £1m - £5m ■ £5m - £20m ■ £20m - 50m ■ > £50m



How many employees does your charity have?

■ < 50 ■ 50 - 100 ■ 100 - 500 ■ > 500



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