

ABOUT THIS RESOURCE

This tool was specifically designed for the groups attending the Waterway Restoration Conference, based on information and research published by Canal & River Trust. The aim is to help charities evaluate their current culture around governance, youth inclusion, and diversity.

Aims of the tool:

- To support Trustee Boards (or your charity in general) to collectively understand how diversity is at the centre of good practice, and explore what role every member has to play in creating and advocating for inclusive spaces.
- To help you create a practical next step to move this work forward whilst also acknowledging that creating inclusive Trustee Boardrooms is a continuous journey.
- To help identify gaps in knowledge / skills where further learning and support is required.

Who can use this tool:

- This tool is designed to help you diversify your governance.
- You may not be directly involved with the Trustee Board in your role, but there are still ways you can use this evaluation and take action based on the results:
 - Do the assessment from a volunteer or staff (or service user) perspective. Then take your results to the Trustee Board or a relevant volunteer/member of staff.
 - Give this resource to your Trustee Board for them to complete themselves, and follow up to ensure they take action on the results.
 - Adapt the tool so it is relevant for your own setting or project.

How to use this tool:

- Complete the evaluation yourself, or even better get together with your Trustee Board / volunteers / team / service users / whoever is relevant, and complete it together.
 - You will all have different answers- explore that! Why? Who feels differently?
- The evaluation is made up of multiple sections, with 4 statements per section. Score each section 1-5, where: 1 = no/we don't do this, 3 = room for improvement, 5 = we're great at this.
 - Add up the 4 statements in each field to get a score between 4 and 20.
 - These will reveal your comfort, stretch, and panic areas.
- Next steps are given after the evaluation matrix.

THE SELF-EVALUATION MATRIX RESOURCE

*You can swap 'Trustee Board' to 'Volunteers', 'Leadership', 'Project', 'Team' etc if that is more relevant for you.

Part 1 – how we function

Field	Statement	Score (1-5)	Total (4-20)
Organisational purpose	Our organisational values, purpose and impact are central to our Trustee Board discussions.		
	I feel that our Trustee Board understands the community we aim to serve.		
	Our values and purpose are up-to-date in reflecting the current needs/interests of the community we serve.		
	It is easy for the Trustee Board to consider risks + opportunities for the organisation.		
Leadership	I feel we take collective ownership for the decisions we make as a Trustee Board.		
	The Trustee Board feels like somewhere where diverse opinions and views are valued and meaningfully implemented.		
	Our Trustee Board is made up of people of diverse identities and experiences.		
	I understand the Trustee Board priorities for the year and I have enough information to do my duties in this.		
Integrity	As a Trustee Board we work in ways which support the organisation values and aims.		
	We work in ways which are transparent and accountable.		
	We work through conflicts between us well e.g. with honesty, respect, patience.		
	We have trust in one another.		
Decision making and risk control	it is clear how the Trustee Board works and what it works on, including subcommittees.		
	I feel that I can raise concerns if I need to.		
	I have received an induction and ongoing support / information in order to be able to understand and make decisions based on relevant systems e.g. the organisation's budget and risk register.		
	I feel able to disagree with other Trustee Board members.		

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Part 2 - growing inclusivity

<u>Field</u>	<u>Statement</u>	<u>Score</u> (1-5)	<u>Total</u> (4-20)
Equality, diversity, and inclusion	Our Trustee Board represents the diversity of the community we seek to serve.		
	We are aware of barriers to inclusion on Trustee Boards - e.g. those faced by working class people, Black people and people of colour, young people, disabled people (including + beyond physical access), LGBTQIA+ people, carers, etc.		
	We work in a way which is inclusive and accessible.		
	We are confident in adapting our ways of working to be accessible and inclusive to new people / the people we want to work with.		
Openness and accountability	We talk to and hear from different people who are impacted by our organisation. It is clear how people can interact with the Trustee Board.		
	We publish clear and accessible information explaining what the Trustee Board and the organisation are doing.		
	I feel confident in dealing with a complaint.		
	We are able to say when we have made mistakes or caused harm, and take appropriate action after e.g. apologise / share learnings / make a change.		
Active Participation. *These are phrased "I am...". You can change it to "All Trustee Board members / staff are...", as this is of course the goal!	I am able to share my views and ask questions if I need more information.		
	I feel like my contribution is valuable and appreciated by others.		
	I feel kept up-to-date with Trustee Board and organisational developments.		
	I feel like appropriate steps have been taken to enable my participation and tackle barriers I face to my work.		
Working with young people *You could swap out 'young people' to match your target audience.	I have adequate knowledge or training to support young people on the Trustee Board or in our work (participation, safeguarding, DBS checks, etc).		
	The roles/projects/services aimed at young people have been co-designed with or reviewed by young people.		
	We are confident in how to recruit and retain young people on the Trustee Board or in our work.		
	I can articulate the benefits of meaningfully involving young people, both for our organisation and for the young people themselves.		

USING YOUR RESULTS

Next steps:

- **Add up the 4 scores** for each field. You should get a number between 4 and 20.
 - **4–8: Panic zone.** This is an urgent area of work.
 - **9–12: Attention zone.** These are priority areas to work on once any panic areas have been addressed.
 - **13–16: Stretch zone.** These areas are looking okay, so it may be worth reviewing them in six months.
 - **17–20: Comfort zone.** These are areas you are working well in. it may be worth reviewing in a year also considering whether there is good practice you could adopt yourself, or share with others.
- **Stay grounded.** Low scores happen, and this tool isn't supposed to invoke shame—that's not how positive change happens! Step 1 is recognising where you're at, celebrating successes, and making a start on problem areas.
- **Pick 1 area.** Trying to solve multiple issues at once usually fails. Choose the most urgent/relevant area, discuss with the team, and make an action plan.
- **Be SMART.** The goals you set and the actions you take should be – Specific (not vague, Measurable (so you can track progress and completion), Achievable (don't set yourself up to fail), Relevant (the action will help you reach your desired outcome), and Timed (set a target date, even if you end up needing to push it back). You can break goals down into multiple smaller objectives if they feel too big.
- **Remember you're not alone.** This is a process, not a destination, and you don't have to do it unsupported! There is a list of helpful resources and organisations on the last page.

FURTHER RESOURCES AND SIGNPOSTING

From Young Trustees Movement:

- Sign up to our free 1 hour Champion Training:
<https://youngtrusteesmovement.org/events>
- Access our resources and digital learning hub, or advertise your vacant trustee position:
<https://youngtrusteesmovement.org/get-involved>
- Get in touch! @YoungTrustees on [facebook](#) and [twitter](#)

From Canal & River Trust / Inland Waterways Association:

The reports referenced here can all be found by searching the title on a search engine, or are hyperlinked on digital versions

- **[“Young Volunteers and Waterway Restoration- Engaging the Next Generation”](#)** is an incredible place to start. **Really can't promote this resource enough!!!!**
 - It contains advice for working with young people that covers all stages from planning and promotion through to delivery, getting feedback, and saying thanks.
 - This is interjected with case studies if you're in need of inspiration!
 - The final page has a link to a drive full of fantastic resources to help with aspects such as outreach, engagement, and risk. It includes templates and examples, as well as more in depth reports.

One of the barriers that has previously been shared with us by members of the Canal & River Trust is ensuring that young people are kept safe during this work. Existing trustees will have skills to aid with this, and there is lots of support available. The above report has safeguarding advice on pages 25-27, and the folder contains relevant resources and templates. Further signposting information:

- Many local councils or organisations offer free safeguarding training, so research what is available in your area.
- The Inland Waterways Association can undertake free basic DBS checks for volunteers. Contact safeguarding@waterways.org.uk.
- The Canal + River Trust **[“National Youth Engagement Framework 2017-2025”](#)**.
- The **Youth Advisory Group** advise on engaging young people.
- The **[“2021 Youth Impact Report”](#)** shares successes and explains the “POWER of youth” charter. which provides a framework for working with young people.

From Other Organisations:

- Getting on Board's **“How to recruit trustees for your charity”** free guide.
<https://www.gettingonboard.org/signup-howto-recruit-trustees-guide>
- Beyond Suffraege's **“Transforming Board Cultures”**, a guide to support charities with recruiting and supporting young women of colour on their boards.
<https://www.socialpracticeacademy.org/tbcguide>