

# Chairpersons As Effective Leaders



DISABILITY FEDERATION OF IRELAND



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# FOREWORD

The Disability Federation of Ireland (DFI) appreciates and recognises the significant roles being performed by the Boards of Directors and Management Committees of voluntary disability organisations within Ireland. These roles include the development of a shared and agreed vision about the key focuses and priorities of disability organisations; an overseeing role in relation to matters concerning financial management and good employment practices; and dealing with particular issues or problems which require the attention of the Board of Directors or Management Committee. In the opinion of DFI, the Board or Management Committee of voluntary disability organisations has a fundamental and vital role to play, together with staff, in ensuring the ongoing effectiveness and sustainability of these organisations.

In acknowledging the contributions being made by the Boards and Management Committees of voluntary disability organisations, DFI is also committed to ensuring that people who volunteer to sit on these Boards are provided with the appropriate levels of guidance, advice, training and support. Within DFI, we are aware of the more onerous legal and financial responsibilities of Board Directors and of the ways in which the size and turnover of many voluntary organisations has increased substantially over the last 10 years. In this type of context, we wish to identify mechanisms for providing greater levels of support to Boards of Directors and Management Committees of voluntary disability organisations.

As a means of assisting DFI to identify the key developmental, training and support needs of voluntary Boards of Directors and Management Committees, we set up the project entitled '*Chairpersons as Effective Leaders*' in 2006. The aim of the project was to work with a cross-section of Chairpersons from DFI member organisations and, following a significant consultation period with these Chairpersons, to develop a range of proposals and recommendations which would serve to enhance governance and management arrangements within voluntary disability organisations in Ireland.

A total of 14 Chairpersons volunteered to participate in the '*Chairpersons as Effective Leaders*' project. These Chairpersons represented a good balance between large voluntary organisations and smaller voluntary organisations, between organisations primarily involved in advocacy and organisations involved in direct service provision and between organisations with a national role and organisations with a regional/local role. However, in all cases, the organisations were providing services which were core and central to the lives of their service users, services which were not being provided by the State or by statutory agencies. DFI feels that the organisations which participated in the project represent a good reflection of the voluntary disability sector in Ireland and that the conclusions and recommendations which have emerged from the project will be of relevance to all DFI member organisations.

The overriding conclusion from the project, and from the detailed questionnaires

completed by the participating Chairpersons, is that a clear need exists for more advice, guidance, support and training to be provided for people involved in voluntary Boards of Directors and Management Committees. Virtually all of the Chairpersons who participated in the project said that they had received no training in their role as Chairperson and that there had been no structured Board development work within their organisation. At the same time, however, they also said that appropriate training and Board development work (in relation to issues like policy development and strategic planning) would have been very useful and beneficial.

This report on the outcomes from the *'Chairpersons as Effective Leaders'* project makes a range of recommendations in relation to the advice, support and training needs of people participating in the Boards and Management Committees of voluntary disability organisations. It is anticipated that the implementation of these recommendations will enhance governance and management arrangements within the voluntary disability sector, will improve the skills and competencies of people who serve on Boards of Directors and Management Committees. As an example, the recommendations concerning the establishment of a Resource Support Centre for Community and Voluntary Disability Organisations has enormous potential and relevance in relation to DFI member organisations. It is hoped that the recommendations will be considered seriously and implemented by appropriate statutory agencies and voluntary organisations.

The environment in which voluntary disability organisations work is changing dramatically. The National Disability Strategy, and its expression through 'Towards 2016', demonstrates the Government commitment to mainstreaming of services for people with disabilities. In addition to steering organisations through a changing services provision environment, there have been, in recent years, growing responsibilities in relation to the accountability of Boards. Now more than ever before, the governance of voluntary disability organisations needs to be supported to lead organisations through times of great change.

During a period of time when the focus of the voluntary disability sector, and DFI in particular, was on the policy agenda in relation to the development of the next Disability Strategy and its various legislative and administrative elements, we consciously have sought to engage consistently around the capacity building agenda for the sector. On foot of the development of policy comes implementation, and the latter is largely dependent on organisational capacity and sector wide capacity. Within any organisation the quality of analysis, judgement and leadership within the Board and between the Board and the senior executive is critical in two ways, namely, what objectives it sets for itself and how it plans to achieve those objectives. There is an urgent need to deepen the capacity of Boards and, equally, to consolidate the critical relationships which must exist between the Board and the executive in

any organisation and I believe there is both a willingness and an appreciation of the value of focusing strongly on these governance roles and relationships.

With the recent commitments in 'Towards 2016' to the development of the Community and Voluntary sector and the launching of the Taskforce on Active Citizenship and the publication of its report, the '*Chairpersons as Effective Leaders*' project, which focuses on the voluntary Chairperson and the voluntary Board, is very timely.

DFI would like to thank a number of agencies, organisations and individuals who contributed to the '*Chairpersons as Effective Leaders*' project. We would initially like to acknowledge the financial support received from the Department of Community, Rural and Gaeltacht Affairs towards the project. This financial support is a clear indication of the interest which the Department has around issues concerning the management and governance of community and voluntary organisations in Ireland. We hope that the analysis, conclusions and recommendations contained in the report will be of benefit to the Department as it identifies ways in which it might best support the community and voluntary sector in Ireland.

DFI is also appreciative of the significant contributions made by the 14 Chairpersons of DFI member organisations who agreed to participate in the project. They all completed a detailed questionnaire and participated in lengthy interviews about a range of issues concerning their own role as Chairperson and the most effective ways of supporting voluntary Boards of Directors and Management Committees. The comments and the suggestions made by the participating Chairpersons have led directly to the interesting and incisive conclusions and recommendations which are set out in this project report.

On behalf of DFI, I would, finally, like to thank the people who helped to set up, to manage and to implement the '*Chairpersons as Effective Leaders*' project. The two main people involved in the process were Stephen Rourke, who is an independent consultant, and Anthony Carrick who is a Support Officer with DFI. Stephen and Anthony invested a significant amount of time in analysing questionnaires, carrying out interviews and writing the final report. We are grateful for their assistance. We are also appreciative of the work carried out by the Steering Group for the project which provided valuable guidance and advice. In addition to Anthony and Stephen, this Steering Group comprised Allen Dunne (DFI), Aidan Horan (Institute of Public Administration) and Cora Pollard (Citizens Information Board).

I would like to commend this report to voluntary disability organisations and I hope that it will lead to new initiatives and endeavours which will enhance the supports available to organisations within the community and voluntary disability sector.

**JOHN DOLAN**  
**CHIEF EXECUTIVE OFFICER**  
**DISABILITY FEDERATION OF IRELAND**

# 1

## Introduction

# 1. INTRODUCTION

## 1.1 DISABILITY FEDERATION OF IRELAND

Disability Federation of Ireland (DFI) is the national support organisation and advocate for voluntary disability organisations in Ireland which provide services to people with disabilities and disabling conditions. DFI represents and supports over 150 voluntary disability organisations and works with over 200 other organisations and groups around Ireland which have an interest in issues and services relating to disability. DFI also supports and represents the voluntary disability sector through its participation in the Social Partnership process and its membership of bodies such as the National Economic and Social Forum.

## 1.2 BACKGROUND TO CHAIRPERSONS AS EFFECTIVE LEADERS PROJECT

DFI is clear about the need to provide support to organisations and groups which are working in the voluntary disability sector in Ireland in order to enhance their effectiveness and the quality of services which they provide to service users. Through its work with a large number of disability organisations, DFI was concerned about the levels of advice, guidance and training which was being made available and which was being accessed by the Boards of Directors and Management Committees of voluntary disability organisations. In particular, there was some concern that the significant increases in resources

(both financial resources and human resources) within many voluntary disability organisations over the last 5 – 10 year period had not been matched by the provision of additional training and support for the voluntary Boards/Committees which had ultimate responsibility for the effective utilisation of these resources.

As a means of trying to identify the developmental, support and training needs of voluntary Boards and Management Committees, DFI decided to link into the Board experiences of a representative cross-section of the Chairpersons of DFI member organisations. It was anticipated that fairly intensive consultative work with these Chairpersons would elicit a range of interesting and relevant views, opinions, ideas and recommendations about the support, training and developmental needs of people involved in a voluntary capacity on the Boards and Management Committees of voluntary disability organisations in Ireland.

## 1.3 TERMS OF REFERENCE FOR PROJECT

The terms of reference for the Chairpersons as Effective Leaders project were as follows:

- To determine the extent to which support and/or training is provided to, and is available to, Chairpersons of voluntary disability organisations
- To assess the support, training and/or developmental needs of the



Chairpersons of voluntary disability organisations

- To identify ways in which the support, training, advice and guidance provided to Chairpersons of voluntary disability organisations might be improved and enhanced
- To consider ways in which the Boards of Directors and Management Committees of voluntary disability organisations might become stronger and more effective through the provision of appropriate support and training
- To make recommendations in relation to actions and initiatives which will enhance the capacity of the voluntary disability sector in Ireland

## 1.4 METHODOLOGY FOR PROJECT

The Chairpersons as Effective Leaders (CEL) project took place between June 2006 and March 2007. The main actions which took place during this nine month period were as follows:

- A DFI staff member, Anthony Carrick (Support Officer with DFI), initiated the project, DFI having secured funding for the project from the Department of Community, Rural and Gaeltacht Affairs
- Letters were sent to the Chairpersons of DFI member organisations asking if they would

be interested in becoming involved in the DFI project. Fourteen Chairpersons agreed to participate in the project (Appendix 1)

- An independent consultant, Stephen Rourke, was recruited to implement the project with Anthony Carrick from DFI
- A Steering Group was set up to provide advice and guidance about the ongoing development of the CEL project. In addition to Anthony Carrick and Stephen Rourke, the Steering Group comprised Allen Dunne from DFI, Aidan Horan from the Institute of Public Administration and Cora Pollard from the Citizens Information Board (previously known as Comhairle)
- A detailed questionnaire containing 78 questions was distributed to the Chairpersons who participated in the CEL project (Appendix 2). This questionnaire was completed by all of the 14 Chairpersons
- Structured interviews took place with all of the 14 Chairpersons. These interviews focused on issues raised in the completed questionnaires and on other issues relating to the support and training needs of people involved on the Boards and Management Committees of voluntary disability organisations
- An interim report on the CEL project was produced in December 2006

and was presented to the CEL participating Chairpersons and members of the CEL Steering Group. Feedback on the issues and recommendations contained in the interim report has helped to inform the conclusions and recommendations contained in this final report on the CEL project.

## **1.5 STRUCTURE OF PROJECT REPORT**

The next section of the project report (Section 2) will detail the main findings and results which have emerged from the questionnaires which were completed with the participating Chairpersons. Section 3 of the report will set out the main outcomes and policy issues which are considered to be of most relevance to the development of appropriate and adequate supports for the Boards and Management Committees of voluntary disability organisations. The final section of the project report (Section 4) will make a number of recommendations in relation to actions and initiatives which have the potential to enhance the effectiveness and efficiency of Boards and Management Committees within the voluntary disability sector.

# 2

## CEL Project – Research Findings & Results

## 2. CEL PROJECT – RESEARCH FINDINGS AND RESULTS

### 2.1 INTRODUCTION

The questionnaire which was completed by the 14 Chairpersons who participated in the CEL project contained a total of 78 questions. This section of the research report will detail the responses of the participating Chairpersons to a significant number of the quantitative and qualitative questions which were asked in the questionnaire. These responses will be set out under the following headings (headings which correspond to the ways in which the questionnaire was structured):

- **Personal Profile of Chairpersons**
- **Role of Chairpersons within Voluntary Disability Organisations**
- **Boards of Directors and Management Committees**
- **Relationship with Chief Executive**
- **Opinions about Roles of Chairperson and Directors within Voluntary Disability Organisations**

### 2.2 PROFILE OF PARTICIPATING CHAIRPERSONS

#### (i) Responses to Questions

##### 1. What is your gender?

Male	11 (78.6%)
Female	3 (21.4%)

##### 2. What is your age?

Under 40 years	0 (0%)
40 – 50 years	4 (28.6%)
51 – 60 years	6 (42.9%)
61 – 70 years	3 (21.4%)
71 – 80 years	0 (0%)
Over 80 years	1 (7.1%)

##### 3. What is/was your paid employment?

Involved in Business	6 (42.9%)
Social/Community Services	4 (28.6%)
Solicitor/Barrister	2 (14.3%)
Education	1 (7.1%)
Civil Service	1 (7.1%)

##### 4. Have you previous experience of working with voluntary organisations/Boards?

Significant Experience	10 (71.5%)
Limited Experience	3 (21.4%)
No Experience	1 (7.1%)

**5. Do you have any other current voluntary commitments?**

Significant Other Commitments	5 (35.7%)
Limited Other Commitments	4 (28.6%)
No Other Commitments	5 (35.7%)

*(ii) Analysis of Responses*

The Chairpersons who participated in the CEL project (see Appendix 1 for list of participants) are involved in a broad cross-section of voluntary organisations, ranging from large national organisations to relatively small regional/local organisations. The profiles of the participating Chairpersons indicate that most of the Chairpersons are male (78.6% of participants), are aged between 40 and 60 (71.5% of participants), are employed or have been employed in their own business or in a senior professional position (85.7% of participants).

In relation to their involvement within the community and voluntary sector, it is evident that the Chairpersons who participated in the CEL project have accumulated a significant amount of experiences with a wide variety of voluntary organisations and community based groups. It is apparent that many of the Chairpersons are motivated and driven by a strong sense of civic duty, altruism and a desire to help others within society. The fact that the large majority of project participants are

involved or have been involved in a number of voluntary organisations is a clear demonstration of their commitment to the concepts of volunteerism and active citizenship and to contributing time and skills to the organisations with whom they have become involved.

Over half of the project participants are either people with disabilities or relatives of people with disabilities. Their clear motivation for engaging with voluntary disability organisations related to a direct understanding and knowledge of the needs and circumstances of disabled people. It is also interesting to note, however, that many of the Chairpersons who participated in the CEL project have also had significant levels of involvement in non-disability voluntary organisations, e.g. Girl Guides, Rotary Clubs, Lions Clubs, Parents Associations, School Boards of Management, Red Cross, Samaritans, Adult Learning Groups.

## 2.3 ROLE OF CHAIRPERSONS

### (i) Responses to Questions

1. How many years have you been with the organisation of which you are Chairperson?

0 – 3 years	1 (7.1%)
4 – 7 years	6 (42.9%)
8 – 11 years	1 (7.1%)
12 – 15 years	1 (7.1%)
16 – 19 years	3 (21.4%)
20+ years	2 (14.3%)

2. How many years have you been Chairperson?

0 – 3 years	8 (57.1%)
4 – 7 years	5 (35.7%)
8 – 11 years	0 (0%)
12 – 15 years	1 (7.1%)
16+ years	0 (0%)

3. How many hours per month do you give the organisation which you chair?

0 – 5 hours	0 (0%)
6 – 11 hours	1 (7.1%)
12 – 17 hours	5 (35.7%)
18 – 23 hours	4 (28.6%)
24 – 29 hours	1 (7.1%)
30 – 35 hours	0 (0%)
36+ hours	3 (21.4%)

4. Did you receive any induction or handover from the previous Chairperson?

Yes	4 (28.6%)
No	9 (64.3%)
N/A (New Organisation)	1 (7.1%)

5. Did you receive any training for the position of Chairperson?

Yes	1 (7.1%)
No	13 (92.9%)

6. Would training in chairing skills have been helpful or useful?

Yes	11 (78.6%)
No	3 (21.4%)

7. Have you experience and/or training in managing people in diverse and complex situations?

Yes	10 (71.4%)
No	4 (28.6%)

8. Do you prepare for succession planning (i.e. for selection of next Chairperson)?

Yes	7 (50%)
No	7 (50%)

## *(ii) Analysis of Responses*

It is evident that a significant minority of the participating Chairpersons have been involved with the organisations which they are chairing for a considerable period of time – five of them (i.e. 35.7% of participants) have been involved for at least 16 years.

It is also apparent, however, that the Chairpersons have made clear decisions that they will only assume the role of Chairpersons for a certain limited period of time and that it would not be in their own best interest or the best interests of the voluntary organisation they are chairing to remain as Chairperson for too long. Thirteen of the participating Chairpersons (i.e. 92.8%) have been Chairperson for seven years or less and there is a very clear sense that the maximum time that a person should remain as Chairperson for any unbroken period is five years (although there are a few examples of people who were Chairpersons in the past being asked to become Chairperson again after a gap/lapse of a number of years).

The responses to the questionnaires would indicate that the participating Chairpersons invest a significant amount of voluntary time and effort into the organisation in which they are involved. Thirteen of the Chairpersons (92.8%) contribute at least 12 hours a month to their organisations, with three of the Chairpersons (21.4%) contributing over 35 hours a month to their organisations. These represent significant levels of engagement and, on the basis of the completed questionnaires and the

interviews with Chairpersons, it is clear that the inputs made by the Chairpersons are, generally, fairly specific and precise, (e.g. to chair meetings, to meet with the Chief Executive on regular basis, to represent organisation at meetings with funders and at public events).

The responses from the questionnaires and the interviews would indicate that there is relatively little formal support or training being provided to the Chairpersons of voluntary disability organisations. It is recognised that, in many cases, there is no real need for support or training because the Chairperson is very skilled and experienced and because he/she has their own support structures and systems.

The CEL project, however, did also highlight the fact that there is a significant need/demand for training and support from many Chairpersons of voluntary disability organisations. Although no training in skills relating to chairing a voluntary Board of Directors had been provided to any of the Chairpersons who participated in the project, it is interesting that 11 of these Chairpersons (78.6%) said that some form of training would have been helpful and useful.

## 2.4 BOARDS OF DIRECTORS AND MANAGEMENT COMMITTEES

### (i) Responses to Questions

1. How many Directors are there on the Board/Management Committee?

2 – 4 Directors	2 (14.3%)
5 – 7 Directors	4 (28.6%)
8 – 10 Directors	4 (28.6%)
11 – 13 Directors	3 (21.4%)
14 – 16 Directors	1 (7.1%)

2. What background, life experiences and skills do they bring to the Board?

Knowledge/Experience of Issue or Condition being Addressed by Organisation	52% of Directors
Business/Professional skills which are of Relevance and Value to Organisation	21% of Directors
Combination of Knowledge/Experience and Business/Professional Skills	27% of Directors

3. Are Directors provided with access to previous Board minutes and documentation?

Yes	4 (28.6%)
No	10 (71.4%)

4. Is there an Executive Committee which oversees the day-to-day operation of the Organisation?

Yes	5 (35.7%)
No	9 (64.3%)

5. Do you assess the performance skills and length of service of current Board members?

Yes	2 (14.3%)
No	12 (85.7%)

6. Do you conduct Board inductions?

Yes	5 (35.7%)
No	9 (64.3%)

7. Do you conduct Board appraisals?

Yes	2 (14.3%)
No	12 (85.7%)

### (ii) Analysis of Responses

The Chairpersons who participated in the CEL project generally felt that there were ways in which the governance and management of community and voluntary sector organisations in Ireland could be improved. As these organisations grow, in relation to income and staffing levels, there is also a parallel need to ensure that the appropriate systems and procedures for good governance, for accountability and for transparency are put in place. A number of Chairpersons who



participated in the project said that there were governance matters which needed to be addressed within their own organisations but they were not sure about whom they should approach for advice and guidance.

In relation to the issue of Board members, some Chairpersons recognised the need to change the balance of Board membership and to get a more appropriate balance between people who had direct knowledge and experience of disability and people who had particular skills and aptitudes which they could contribute to the Board, (e.g. financial skills, legal skills, public relations and advocacy skills). In some cases, Board members might have a combination of knowledge/experience and skills/aptitudes.

Chairpersons also said that they would like to introduce new systems and procedures into the operations of the Board to cover issues like induction, review of Board operations and effectiveness, appraisal of contribution of Board members. The outcomes from the CEL project would indicate that these types of processes are only functioning in a minority of voluntary organisations.

Whilst expressing a clear desire and intention to improve the effectiveness of their Boards and Management Committees, many Chairpersons said that they did not know of support organisations and agencies which could carry out some type of audit or review of Board structures, Board procedures, Board membership and Board

effectiveness. It is also recognised, however, that some of the voluntary organisations which participated in the CEL project have very sophisticated and advanced governance structures, (e.g. which include a nominations committee for Board membership, an audit committee and a comprehensive induction process for new Board members).

It is considered that more sharing of information about best practice and the availability of a support service (particularly around management and governance issues) would be greatly appreciated by many of the Chairpersons who participated in the CEL project.

## 2.5 RELATIONSHIPS WITH CHIEF EXECUTIVE

### (i) Responses to Questions

1. Do you conduct an annual appraisal of the Chief Executive?

Yes	10 (71.4%)
No	4 (28.6%)

2. Are there clear lines of reporting between you and the Chief Executive?

Yes	10 (71.4%)
No	4 (28.6%)

3. Is there a clear understanding of division of responsibility and roles between you and the Chief Executive?

Yes	9 (64.3%)
No	5 (35.7%)

4. Do you have a positive, supportive and constructive relationship with the Chief Executive?

Yes	11 (78.6%)
No	3 (21.4%)

#### *(ii) Analysis of Responses*

The large majority of the Chairpersons who participated in the CEL project feel that they have a very constructive and positive relationship with the Chief Executive of their respective organisation. It is evident that the interaction, the synergy and the mutual respect which exists between the Chairperson and the Chief Executive of voluntary disability organisations is, perhaps, one of the most significant relationships which exist within these organisations. It is encouraging that the Chairpersons involved in the CEL project were generally very comfortable and very satisfied with their relationship with their Chief Executive and with the ways in which they have worked out their respective roles.

In the course of the interviews and the completed questionnaires which formed core elements of the CEL project, the participating Chairpersons said that it

would be useful to produce guidelines and information notes about the best ways to develop effective relationships between Chairpersons and Chief Executives of community and voluntary organisations. Whilst virtually all of the relationships between Chairpersons and Chief Executives involved in organisations participating in the CEL project were positive and harmonious, Chairpersons were also aware of the fact that some relationships between Chairpersons and Chief Executives were much more difficult and divisive.

Hence, there was an expression of the need to develop support structures to provide guidance and advice about key organisational relationships such as the relationship between Chairpersons and Chief Executives. It is considered that the development of appropriate support structures and the production of resource materials about management and governance issues within the community and voluntary sector could be of significant benefit to a large number of organisations and groups.

On the basis of the feedback provided by Chairpersons on the CEL project, it is apparent that many Chairpersons (and especially incoming Chairpersons) could benefit from some advice and guidance about the best ways to manage relationships between Chairpersons and Chief Executives within voluntary disability organisations.

## 2.6 OPINIONS ABOUT STRUCTURES AND ABOUT ROLES OF CHAIRPERSON WITHIN VOLUNTARY DISABILITY ORGANISATIONS

### (i) Responses to Questions

1. In your opinion, how would you consider the existing structures within your organisation?

Appropriate	3 (21.4%)
Aligned to our Strategic Plan	6 (42.8%)
In need of slight amendment	7 (50.0%)
Being actively reviewed	10 (71.4%)
Inappropriate	0 (0%)
In need of radical overhaul	2 (14.3%)
Currently being changed	4 (28.6%)

2. What is your assessment of the skills required for the role of Chairperson?

Good Communications Skills	9
Strategic Thinking	7
Leadership	6
Common Sense	4
Facilitation Skills	3
Patience	3
Diplomacy	3
Knowledge of Key Issues	3
Understanding Finance/Money	2

### 3. What is your assessment of your own skills?

	Level of Skill		
	High	Medium	Low
Working with Statutory Bodies	5 (35.7%)	7 (50.0%)	2 (14.3%)
Strategic Planning	7 (50.0%)	5 (35.7%)	2 (14.3%)
NGO Governance	5 (35.7%)	7 (50.0%)	2 (14.3%)
Finance	6 (42.9%)	5 (35.7%)	3 (21.4%)
Communications and Media	4 (28.6%)	6 (42.9%)	4 (28.6%)
Fundraising	5 (35.7%)	5 (35.7%)	4 (28.6%)
Funding	4 (28.6%)	6 (42.9%)	4 (28.6%)
Knowledge of Policy and Legislation	5 (35.7%)	6 (42.9%)	3 (21.4%)
Business Development Experience	7 (50.0%)	5 (35.7%)	2 (14.3%)
Commercial Awareness	6 (42.9%)	5 (35.7%)	3 (21.4%)
Risk Assessment and Management	5 (35.7%)	7 (50.0%)	2 (14.3%)
Management	6 (42.9%)	6 (42.9%)	2 (14.3%)
Management of the Board	7 (50.0%)	5 (35.7%)	2 (14.3%)

#### (ii) Analysis of Responses

It is evident that many organisations and groups within the voluntary disability sector are reflecting upon ways in which they might improve their operations and their efficiency. In more particular terms, they are thinking about ways in which they might improve their structures and their governance arrangements in order to enhance their effectiveness and the quality of services which they provide to service users.

It is apparent that 11 of the 14 organisations participating in the

CEL project are currently reviewing the appropriateness of their organisational structures and could benefit from the experiences of other organisations involved in restructuring processes and from the production of guidelines and information notes relating to change management and organisational development. Feedback from the Chairpersons who participated in the CEL project suggests that they would greatly appreciate the availability of appropriate support and advisory services which would assist them in making strategic and structural changes

within the organisation in which they are involved.

In relation to the skills required for Chairpersons of voluntary disability organisations, it is evident that many of the Chairpersons who participated in the CEL project feel that they are fairly strong in some areas of organisational development and project management but weak in some other areas. For example, some might know a lot about how to run a business or organisation but not about providing community or social services, whilst others might have a stronger social focus rather than an economic focus. In this context, there is a clear need for voluntary organisations to decide upon the types of skills which they require at the Board/Management level.

# 3

## CEL Project – Outcomes & Policy Issues

## 3. CEL PROJECT – OUTCOMES AND POLICY ISSUES

### 3.1 INTRODUCTION

The outcomes from the 14 completed questionnaires and from the 14 interviews which took place with the Chairpersons who participated in the CEL project included a wide range of perspectives, views and ideas, both about the development of the community and voluntary sector in Ireland and about ways in which the operations of voluntary organisations might be improved and enhanced. This section of the CEL project report will consider the various contributions and inputs into the CEL project under the following headings:

- Diversity of Organisations and Groups
- Pace of Growth and Development
- Clear Focus and Purpose
- Organisational Development
- Sharing of Best Practice and Guidelines
- Role of Chairperson
- Composition of Boards
- Training and Support Needs of Board Members
- Board Development

### 3.2 DIVERSITY OF ORGANISATIONS AND GROUPS

- There is a significant diversity of organisations and groups within the voluntary and community sector in Ireland – diverse in relation to issues such as size, ethos, value system, management style, purpose and function. It would be unwise and inappropriate to attempt to put in

place a range of guidelines, systems and procedures to be adopted by all voluntary sector groups and organisations in Ireland. For example, some of the larger organisations with a substantial income and a large number of staff might put in place sub-structures such as audit committees, a remuneration committee and a buildings committee. This relatively sophisticated organisational infrastructure would not be necessary within smaller organisations.

*'We have to operate like a business since our turnover and number of employees would equate to a medium sized business within the private sector.'*

*'We are a fairly small operation and we do not want to become too bureaucratic with lots of different committees. We would rather stay small and focused rather than become a large service provider which might become increasingly dependent on major statutory funders. We might lose our independence and our freedom to criticise Government policy.'*

- In recognising the need to embrace the diversity and richness of the groups and organisations which comprise the voluntary and community sector in Ireland, there is a clear need for these groups and organisations to put in place the types of governance and management structures which are most appropriate to their needs

and circumstances. There is some concern that some of these structures are not as strong and robust as they might/should be and that many organisations and groups could benefit from advice and guidance in relation to the development of robust and effective governance/management structures and systems.

*'I am not too sure if the structures and systems that we have within our organisation are the most appropriate and most effective in relation to our needs and the services which we provide. However, I do not know what is the best thing to do, since I am no expert in different types of governance arrangements.'*

*'I know that we should be reviewing our structures and systems. We are so busy getting on with our day-to-day work, though, we do not have the time to think about the way in which we are structured.'*

### 3.3 PACE OF GROWTH AND DEVELOPMENT

- A number of Chairpersons commented upon the ways in which their organisations have grown and developed in the last five years, e.g. going from no employees to three full-time employees; income increasing from €150,000 per year to €750,000 per year; a recently established organisation with a current income of more than €5 million and employing 250 people; an accessible transport

company with a fleet of minibuses which has increased from 3 to 13. In relative terms, for all these organisations, this type of growth is very significant. The Chairpersons of organisations which have been established for a fairly long period of time agreed that there has been as much change and growth in the last 5 – 10 years as in the previous 25 – 30 years.

*'It seems that a lot more resources are being put into voluntary disability organisations and that these organisations are being asked to deliver a lot more services to disabled people in Ireland.'*

*'We never really expected to be as big as we are today. We certainly didn't plan it at the start – but the opportunities and money became available.'*

- The Chairpersons consulted during the CEL project felt that it is really important to be able to handle and to manage growth and expansion in an effective and professional manner. Some of them said that the structures and the skills (at Board level and executive management level) required for a fairly small organisation with a limited income and no workers is different to an organisation with employment responsibilities and which is handling fairly large sums of public money.

Some of the Chairpersons are concerned that significant increases in income (primarily through larger



Government grants) are not always matched by improvements in structures and systems and the changes that are required for an organisation which might be increasing their income by a multiple of four or five over a fairly short period of time.

*'We haven't changed our basic governance and management model although there has been a large increase in income and activity. One of the strange things is that the HSE (who are our major funder) have never demanded or asked us to review our Board structures or to bring people with relevant skills onto the Board.'*

*'We knew we were getting too big for our structures and that we needed to have an honest look at whether we had the right type of skills mix at all levels of the organisation (including the Board). We had a root-and-branch review and we brought new people onto the Board with the appropriate skills and contacts.'*

### 3.4 CLEAR FOCUS AND PURPOSE

- It is vital to maintain a clear and single-minded focus on the main purpose and mission of the voluntary organisation and the group of people whom the organisation was set up to support and assist. Concern was expressed that as organisations grow (more money, more staff, more activities/centres to manage), more attention is given to operational issues concerning

finance, budgets, recruitment and retention of staff than time given to ways in which services to clients, customers, residents and service users might be improved.

Some Chairpersons said that alarm bells should start ringing within voluntary organisations when the needs of service users become subservient to the needs of staff and Board members and to internal politics and conflicts which might be taking place within organisations.

*'A lot of our Board meetings are taken up with petty issues and with staff matters rather than focusing in on how we can improve the services being provided to clients.'*

*'In our organisation the Board meetings only concentrate on issues concerning new services (and the axing of obsolete services), policy development and fundraising. All the internal operational stuff is handled by the senior management team and different sub-committees.'*

- Whilst it is recognised that proper financial and personnel systems need to be put in place, it is also possible to have the required time and space to talk about the quality of the services being provided and ways in which these services might be improved. Indeed, most successful organisations have achieved the right type of balance between the operational aspects of their work and the mission/vision aspects of their work. There is a view that the

Board of a voluntary organisation should be primarily concerned with their organisation's mission/vision, whilst having a clear overview of important operational matters such as finance and human resources issues.

*'We have to ensure that our services are meeting the changing needs of our clients and service users.'*

*'It would be useful if mechanisms could be developed and safeguards put in place to ensure that the Board is collectively focused on the needs of the clients rather than the needs of staff or the needs of Board members.'*

### 3.5 ORGANISATIONAL DEVELOPMENT

- A number of the Chairpersons talked about the difficulties in developing organisational structures and models which are appropriate to the needs of the organisations in which they are involved.

They talked about the size of the Board; the skills required on the Board; the balance between the need for business/management skills and people with direct experience of the issue/condition being addressed; about the most effective type of sub-structures below the main Board, (e.g. sub-committees, working groups, operations groups, office holder groups). These are all fairly heavy issues being addressed by a number of the Chairpersons who are participating in the CEL project.

*'Chairing a voluntary organisation is a lot more difficult and a lot more complex than it used to be a few years ago. There seems to be a good deal more regulation and legislation and more bureaucracy in reporting to funders and in the employment of staff.'*

*'I know that we need to restructure our organisation. However, there is so much to do and so many people to talk to, like branch members and staff. I am not too sure where to start.'*

- The Chairpersons commented upon the fact that they are largely unaware of where to go in order to seek advice and guidance about issues relating to organisational development and strategic planning for organisations and groups within the voluntary and community sector in Ireland.

There is no type of one-stop shop where one can go for help and advice (like the National Council for Voluntary Organisations in the United Kingdom) nor is there a network of Chairpersons of voluntary organisations where it would be possible to link into the knowledge of other Chairpersons who have had experience of change management and organisational growth within their organisations. It would be useful to consider strategies and initiatives through which Boards of voluntary organisations could be supported and advised in their work and activities.

*'It would be great if I could go somewhere to sit down for a few hours with somebody who could give me good solid advice about the ways in which I should manage change within the organisation which I chair.'*

*'I need to talk to somebody outside the organisation who will be objective and impartial and who will give me considered and informed advice about what I should do. I need some type of mentor.'*

### 3.6 SHARING OF BEST PRACTICE

- There is an enormous amount of learning and good practice being lost and not being captured through the absence of effective mechanisms by which information, resource materials and experiences can be shared and disseminated between groups and organisations within the voluntary and community sector in Ireland. On the basis of the Chairpersons who are participating in the CEL project, it is evident that some have fairly well developed and sophisticated governance structures and some have more basic and more rudimentary structures.

However, regardless of the level of sophistication, it is clear that there is a significant amount that the various Chairpersons could learn from each other (especially concerning issues around organisational development, Board development and strategic planning).

*'I am sure that there are useful things which I could learn from other Chairpersons who have more experience of chairing voluntary organisations than I have.'*

*'It seems crazy that there is not more sharing of information about a range of issues which are of concern and interest to hundreds of disability organisations across Ireland.'*

- It is evident that there is an urgent need to create new mechanisms for the flow of information and experiences between Board members (and especially Chairpersons) involved in the work of voluntary and community organisations in Ireland. This need is becoming particularly important in the context of the resources being invested in the sector, e.g. in 2005 the Health Service Executive paid out €2.4 billion to independent non-governmental organisations (of this total, 724 organisations received grants of over €100,000).

This makes it essential that good practice and relevant experiences (around issues like change management, selecting Boards of Directors, effective organisational structures) are shared through mechanisms like case studies, resource materials, information notes, a Chairperson Forum, good practice guidelines.

*'There is a need to provide opportunities for Chairpersons of voluntary organisations to network and to connect with each other.'*

*'I think our organisation has lost a bit of its focus and direction. It would be good to talk to other Chairpersons who have experienced similar issues.'*

*'In 18 years with X, I have never spoken to another Chairperson from another voluntary organisation.'*

### **3.7 ROLE OF CHAIRPERSON**

- There are varying opinions about the challenges involved in chairing the Board of a voluntary organisation. Some of the Chairpersons involved in the CEL project felt comfortable, confident and competent in their role as Chairperson – a number of these people had prior experience of chairing organisations (in the private sector and/or the voluntary sector).

Some other Chairpersons, however, said the chairing of their particular organisation was stressful and onerous and that they felt isolated and unsupported in their role as Chairperson – there was only a certain amount of support and advice forthcoming from other Board members and from the staff of the organisation which they were chairing. These Chairpersons said that it would be very useful and helpful to be able to link into either a mentor (to act as a sounding board to provide advice/guidance) or to be

a member of a Chairperson Forum (which would provide them with an opportunity to link into the experiences, insights and knowledge of other Chairpersons).

*'I have no problem in chairing the voluntary organisation in which I am involved. I apply the same principles to chairing this organisation as I do to my paid professional work.'*

*'I never got any training or advice about how to be Chair of an organisation or about how to sort out conflicts and personality clashes within organisations. In hindsight, some type of training in these kinds of issues would have been helpful.'*

- It is apparent that the role of a Chairperson can differ quite significantly from organisation to organisation. Some organisations are Chief Executive led (with the senior management team playing the most fundamental role in operational and planning issues) whilst other organisations are led by the members and by the voluntary Board (with the senior management team playing a more subservient role than in the Chief Executive led model of organisational development).

It is also evident that the model adopted has much to do with the resources available to the organisation – if the organisation is well resourced, with a senior management team in place, there is not the same need for the voluntary Board to become as involved in

operational issues as is the situation in smaller organisations with few staff members. It is also evident that the personality of the Chairperson and the capacity/competency of the Chief Executive will have a bearing on whether the organisation is a Chief Executive led organisation or a membership/Chairperson led organisation.

*'There is no need for me to get involved in day-to-day issues. There is a well-paid group of senior managers who are more than capable of making decisions on behalf of our organisation.'*

*'I feel that I might get too involved at times and that I may be too accessible to staff members. Nobody has given me clear advice about what I should and shouldn't do in my role as Chair.'*

### 3.8 COMPOSITION OF BOARDS

- A number of Chairpersons spent some time discussing the membership of the Boards which they currently chair. It is evident that there are significantly different approaches in putting together Boards of voluntary organisations. Some people felt that the more important element was to ensure that people affected by the condition/issue being addressed by the voluntary organisation were represented on the Board. Other people felt that the more important element was to have people with appropriate business and management skills on the Board

(regardless of direct experience or knowledge of the issue being addressed by the organisation).

Those people who felt that it was more important for the Board to be representative of service users said that skills/knowledge concerning legal issues, financial management, human resources, etc. could be bought in when required and that it was not necessary for Board members to have these skills. This view was countered by others who clearly stated that running a voluntary organisation was akin to running a business and that it required all of the skills and attributes normally associated with running a successful commercial business.

*'It is important that we do not become too remote or too distanced from our members and clients. That is why the majority of Directors are people with a disability. In addition, this means that we cannot be accused of running an organisation where decisions relating to disabled people are being made by non-disabled people.'*

*'The most important thing is to ensure that we have people on the Board with relevant and appropriate skills. It doesn't matter if they have not been affected by disability in their lives (either as a disabled person or as the relative of a disabled person).'*

- The decision to adopt a business model or a representative model is influenced significantly by the



key activities of the voluntary organisation. On the basis of the interviews with Chairpersons, it is apparent that those voluntary organisations which provide a range of direct services to service users (and which are often fairly well resourced) are more likely to put a business model in place in relation to the selection of Board members and the organisational structures which are put in place by the Board, (e.g. audit committee, remuneration committee).

On the other hand, voluntary organisations which are primarily involved in advocacy and in campaigning and lobbying for policy change within Government Departments and which are less involved in direct service provision are more likely to have a Board composed of people who have been directly affected by the issue/condition being addressed by the particular voluntary organisation.

*'If we are to have any credibility in the submissions which we put into Government Departments and the HSE it is really important that our Board is seen to be comprised largely of people who have experienced X condition.'*

*'If we are to make major decisions about purchasing new buildings or setting up new services, we need to make sure that we have the right people on the Board who are used to making decisions about major investment projects.'*

### 3.9 TRAINING AND SUPPORT NEEDS OF BOARD MEMBERS

- A significant majority of the Chairpersons who participated in the CEL project stated that it would be beneficial if training and support could be made available to their Boards. The extent to which this training and support would be utilised will be determined largely by the main priorities and challenges for the organisation, e.g. it might relate to fund-raising or to launching a public awareness campaign or to bringing about changes in legislation or to more integration within local communities in Ireland.

There is also a view that there are more generic topics which should be of relevance to Board members of most voluntary organisations, e.g. in relation to duties and responsibilities of non-Executive Directors, understanding accounts, evaluation, appraisal, performance indicators, equality legislation, employment legislation. It is also recognised, however, that some Boards have non-Executive Directors with a whole range of skills and that it might be unnecessary and superfluous for these Directors to participate in training courses and programmes.

*'We have never thought about carrying out a training needs assessment of Board members. It might be a very good idea to provide training for Board members as well as for staff members.'*

*'Our organisation assumes, when people are selected or nominated to join the Board, that they are very competent and skilled individuals. It would be demeaning to send them on a training course. Anyway, they would probably be far too busy to go on a course.'*

- Very few of the Board members of the voluntary organisations which are participating in the CEL project have attended training programmes and activities relevant to their involvement in these organisations. Training programmes include out-of-house training programmes (delivered by groups like Carmichael Centre, The Wheel, Institute of Public Administration, Irish Management Institute, Citizens Information Board) and in-house training programmes (where trainers and consultants would carry out targeted work within individual organisations).

There is a fairly limited awareness of the organisations and agencies which can provide appropriate training to Boards of voluntary sector bodies in Ireland. In addition, there is little evidence of any regular or systematic analysis/audit of training needs of Board members of voluntary organisations. Whilst some Boards may only have limited training needs and requirements, the feedback from those involved in the CEL project would suggest that many members of Boards could benefit from being linked into appropriate training opportunities.

*'Our Board do not receive much information about training opportunities for Board members. I guess that when the information about training for Board members comes into the office, the Chief Executive decides that it might not be relevant to the Board and that Board members might not be interested in attending training courses.'*

*'I have not heard about any training courses or training activities for people involved in the Boards of voluntary organisations.'*

### 3.10 BOARD DEVELOPMENT

- There were ongoing references throughout the CEL project (in the questionnaires and in the interviews) to the need for more focused and intensive work to take place with the full Boards of individual voluntary organisations throughout Ireland. This work might relate to the development of a cohesive and well functioning Board 'team'; it might relate to the production of an agreed Strategic Plan (with shared vision and mission about the future roles of the organisation); it might relate to an organisational development review within which the structures of the organisation are reviewed and amended; it might relate to annual review and planning sessions.

There was a general view that, in addition to getting on with the ongoing work of the organisation,

it is also useful to present opportunities for the Board to work more collectively on a common task, (e.g. production of Strategic Plan, review of organisational structures). This type of common task, which might involve the Board spending a protracted period of time together (perhaps in a residential setting) and which might involve an outside facilitator/consultant, can assist greatly in cultivating a greater sense of solidarity, cohesion and common vision amongst the Board members of voluntary organisations.

*'I think it would be better to bring in a person or an organisation to work collectively with the Board around strategic planning rather than sending Board members off on training courses.'*

*'It would be a good bonding exercise for us to spend some time together working around a common task, rather than spending most meetings listening to what the Chief Executive needs to tell us.'*

- There is a need to give greater priority to teambuilding and Board development activities and to recognise the benefits which can accrue through Board members spending quality time with relevant staff members in drawing up strategies and plans for the future. There is a strong view amongst a number of Chairpersons who participated in the CEL project that this type of teambuilding, 'think-in' type of process can only strengthen voluntary organisations and lead to

a greater sense of ownership, buy-in and understanding from the voluntary Board members.

It is recognised that there will often be a significant challenge in persuading Board members to attend teambuilding, strategic development sessions/workshops and in convincing Board members to spend money on external consultants and, perhaps, hire of venues. In this type of context, it was suggested that organisations like DFI might play a leadership role in emphasising the importance of teambuilding and Board development for voluntary Boards of Directors.

*'It would be good for our Board to take some time out to plan ahead for the long-term future of the organisation, rather than getting caught up all the time in day-to-day management issues.'*

*'There is a need to create greater awareness amongst many voluntary organisations about the importance of Board development and strategic planning, in order to enhance the effectiveness and relevance of these organisations.'*



# 4

## Recommendations

## 4. RECOMMENDATIONS

### 4.1 INTRODUCTION

Chairpersons who participated in the CEL project made a number of clear recommendations and suggestions about ways in which the governance and management arrangements for voluntary disability organisations might be improved and enhanced over the next few years. This section of the report on the CEL project will detail these recommendations under the following headings:

- **Development of Support Services**
- **Production of Resource Materials**
- **Development of Skills Base within Voluntary Organisations**

### 4.2 DEVELOPMENT OF SUPPORT SERVICES

#### *Recommendation No. 1*

A Resource Support Centre for community and voluntary disability organisations should be established. This Resource Support Centre would provide information and advice about issues relating to organisational development and change management, about governance of voluntary organisations, about staff and financial control issues and about other matters which are of concern and relevance to the Boards and Management Committees of voluntary disability organisations. The Resource Support Centre would be a type of one-stop shop specifically for voluntary disability organisations, which would be analogous to the supports provided by organisations such as IBEC and

ICTU to employers and trade union organisations.

#### *Recommendation No. 2*

Chairperson Forums should be established to provide opportunities for Chairpersons of voluntary organisations to discuss and to work through issues of common interest. These Forums, which could be organised on a regional level and/or a size-of-organisation level, (e.g. small voluntary group or large voluntary organisation), would provide opportunities for Chairpersons to meet with each other in a confidential, trusting setting. It would enable them to receive presentations on issues of relevance to their organisations and to get advice on matters about which they have some concern.

#### *Recommendation No. 3*

A panel of mentors should be set up to provide advice and support to Chairpersons of voluntary organisations. It is evident that some Chairpersons feel quite isolated and vulnerable, and could benefit significantly from the services of a non-judgemental mentor who has no connection with the organisation with which the Chairperson is involved. It is evident that there is a good pool of potential mentors available, both through the Citizens Information Board and through the type of people participating in the CEL project.

#### *Recommendation No. 4*

A register of consultants and trainers should be set up to enable voluntary

organisations to link into people with the types of skills and expertise which will enhance the capacity and competencies of Board members of voluntary organisations. A number of participants in the CEL project have had disappointing experiences with various trainers and consultants – hence the importance of constructing a list of experienced and reliable consultants and trainers. Most participants were unaware of [www.learningpoint.ie](http://www.learningpoint.ie), a recent initiative of The Wheel.

#### *Recommendation No. 5*

Information about existing support services, courses and programmes should be disseminated more widely amongst the Boards and Management Committees of voluntary disability organisations. In more particular terms, there is a need to ensure that information about courses and programmes is sent to the Chairperson of voluntary organisations as well as to the Chief Executive, so as to ensure that this information comes to the attention of the Board – sometimes the Chief Executive might think that the Board would not be interested in information about training activities.

### **4.3 PRODUCTION OF RESOURCE MATERIALS**

#### *Recommendation No. 6*

Resource materials should be produced on issues relating to Board development and skills required to become effective

members of Boards of voluntary organisations. It is considered that, while there is some material available, overall there is a dearth of these resource materials in the Republic of Ireland, resource materials which are directly targeted at the large numbers of voluntary organisations in this jurisdiction. Feedback from the CEL project would suggest that Board members of voluntary organisations receive limited information about issues concerning the roles and responsibilities of Board members. This situation could be considerably alleviated by the production and dissemination of resource materials about the roles and responsibilities of Board members of voluntary organisations.

#### *Recommendation No. 7*

Resource materials should include the production of Best Practice Guidelines, which would provide information about issues that are of particular interest and relevance to the Boards of voluntary organisations. These Best Practice Guidelines (around issues such as strategic planning, evaluation, employment of staff, organisational development, financial management) could draw on the work already carried out in other countries and could become a very important resource for voluntary and community organisations within Ireland.

#### *Recommendation No. 8*

The production of case studies through which voluntary organisations describe the development and growth of their

own organisations would be welcomed by many of the Chairpersons who participated in the CEL project. They said that it would be really useful to link into the learning and the experiences of other organisations who have been established for a longer period of time and who have more experiences to share with newer, emerging organisations and groups.

#### **4.4 DEVELOPMENT OF SKILLS BASE WITHIN VOLUNTARY BOARDS/ COMMITTEES**

##### *Recommendation No. 9*

Strategies need to be developed to bring more people with business acumen and skills onto the Boards of voluntary organisations. Whilst it is recognised that organisations like Boardmatch are a conduit between voluntary organisations and potential volunteers, it appears that there is still a significant difficulty in attracting business people to play an active role in the Boards of voluntary organisations. Perhaps, organisations like DFI, Boardmatch and Business in the Community can help to encourage more corporate involvement in the activities of voluntary organisations.

##### *Recommendation No. 10*

There should be a greater focus on the training and developmental needs of the members of Boards of voluntary disability organisations. Board members should be encouraged, where

considered appropriate or necessary, to engage in training activities which will enhance their effectiveness as Board members. This type of process might involve some sort of needs analysis of the training and support requirements of Board members.

##### *Recommendation No. 11*

Consideration should be given to the establishment of a Board Development Fund, a fund which could only be used for activities and programmes which aim to enhance the skills and effectiveness of people involved in the Boards and Management Committees of voluntary disability organisations. The establishment of this type of Board Development Fund would help to assuage Board members who might feel that all of an organisation's income should be utilised on direct services to clients and service users.

# APPENDIX 1

List Of Chairpersons  
Who Participated In CEL Project

## LIST OF CHAIRPERSONS WHO PARTICIPATED IN CEL PROJECT

NAME OF CHAIRPERSON	ORGANISATION
Don Bailey	Vantastic
Des Byrne	Focus Ireland
Bernard Daly	National Association for Deaf People
Charlie Daly	Irish Guide Dogs for the Blind
Marie Devine	Bodywhys
Mike Foley	Heart Children Ireland
Hugh Hamilton	Post Polio Support Group
Thomas King	Disabled People of Clare
Mary Lane Heneghan	Cystic Fibrosis Association of Ireland
Joe T. Mooney	Lucan Disability Action Group
Maurice O'Connell	The Peter Bradley Foundation
Michael Quinn	Centre for Independent Living, Dublin 7
Henry Tierney	National Council for the Blind of Ireland
Louise Wardell	Multiple Sclerosis Society of Ireland

# APPENDIX 2

Questionnaire Used  
With CEL Participants

# QUESTIONNAIRE USED WITH CEL PARTICIPANTS

**ALL REPLIES AND ALL INFORMATION WILL BE TREATED  
IN THE STRICTEST CONFIDENCE.**

## SECTION A: YOUR PERSONAL PROFILE

**A1** Name:

**A2** Organisation:

**A3** Are you: Male ☐ Female ☐

**A4** What age are you?

Under 40	<input type="checkbox"/>
40 – 50	<input type="checkbox"/>
51 – 60	<input type="checkbox"/>
61 – 70	<input type="checkbox"/>
71 – 80	<input type="checkbox"/>
Over 80	<input type="checkbox"/>

**A5** Where do you live?

**A6** Are you currently in paid employment? Yes ☐ No ☐

If yes, what is your current occupation?

**A7** What other work experience do you have?

**A8** What past experience do you have of volunteering?



**A9** What are your current voluntary commitments?

**A10** What academic or professional qualifications do you hold?

## SECTION B: YOUR PROFILE WITHIN THE ORGANISATION

**B1** How many years have you been with this organisation?

**B2** How many years have you served on the Board in this term?

**B3** How many years have you served on the Board in total?

**B4** How many years have you served as Chair in this term?

**B5** How many years have you served as Chair in total?

**B6** Have you ever served in another officer capacity on the Board?  
(Vice Chair, Treasurer or Secretary)?

Yes ☐ No ☐

If yes, for how many years in total?

**B7** How many years **can** you serve as Chair in this term?

**B8** How many years **can** you serve on the Board in this term?

**B9** Please indicate your main reason(s) for becoming Chair?  
(Please tick as many as are applicable.)

a.	I was formally and legally elected	
b.	It was my turn	
c.	No one else would take it on	
d.	I enjoy it	
e.	I have the skills and knowledge	
f.	I have the necessary experience	
g.	Other reason(s) (please specify)	

**B10** What do you believe makes you qualified for the role?

a.	My background, life experiences and skills	
b.	My experience in and training for the role	
c.	My understanding of the responsibilities of the role	
d.	Other reason(s) (please specify)	

## SECTION C: YOUR ROLE AS CHAIR

**C1** How many hours a month do you devote to the role?

**C2** Are you familiar with the Memorandum and Articles of Association?

Yes ☐ No ☐

**C3** Did you receive any induction or handover from the previous Chair?

Yes ☐ No ☐

**C4** Did you receive any training for the position of Chair?

Yes ☐ No ☐

**C5** Would training in Charing skills be helpful or useful?

Yes ☐ No ☐

**C6** Have you checked the performance structure, strategy, funding and compliance of the organisation?

Yes ☐ No ☐

**C7** Have you experience and/or training in people management in diverse and complex situations?

Yes ☐ No ☐

**C8** Are you familiar with the challenges facing the organisation?

Yes ☐ No ☐

**C9** Do you prepare for succession planning?

Yes ☐ No ☐

**C10** Do all staff have a Job Description and Employment Contract?

Yes ☐ No ☐ Don't Know ☐

**C11** Have you assessed the possible impact of "Founder Syndrome" amongst Board or Staff?

*(This syndrome occurs when, rather than working toward its overall mission, the organisation operates primarily according to the personality of a prominent person in the organisation, for example, the founder, board chair/president, chief executive, etc.)*

Yes ☐ No ☐

**C12** Are you prepared to make difficult decisions?

Yes ☐ No ☐

## SECTION D: WORKING WITH THE BOARD OF DIRECTORS/MANAGEMENT COMMITTEE

**D1** How many Directors are there on the Board?

**D2** What background, life experience and skills do they bring to the Board?

**D3** What particular interests have they got in the organisation?

**D4** Are they prepared to separate/suppress their personal agenda for that of the organisation?

Yes ☐ No ☐ Don't Know ☐

**D5** On average, how many Directors attend a Board Meeting?

**D6** How often does the Board meet?

**D7** Are the Directors formally and legally elected?

Yes ☐ No ☐ Don't Know ☐

**D8** Have they been provided with access to previous Board Minutes and documentation?

Yes ☐ No ☐ Don't Know ☐

**D9** Are all Board Meetings properly constituted as defined by the Memorandum and Articles of Association?

Yes ☐ No ☐ Don't Know ☐

**D10** Are there sub-committees of the Board in place?

Yes ☐ No ☐

**D11** Are all sub-committees properly constituted (as defined by the Memorandum and Articles of Association, if applicable)?

Yes ☐ No ☐ Don't Know ☐

**D12** Is there a Management/Executive Committee that oversees the day-to-day operations of the organisation?

Yes ☐ No ☐

**D13** Have you assessed the performance, skills and length of service of current Board members?

Yes ☐ No ☐

**D14** Have you sought to identify tension, divisions or factions among Board members?

Yes ☐ No ☐

If yes, how?

**D15** Do you conduct Board inductions? Yes ☐ No ☐

**D16** Do you conduct Board appraisals? Yes ☐ No ☐

## SECTION E: WORKING WITH THE CEO

**E1** Did you receive any induction from the CEO?

Yes ☐ No ☐

**E2** Are you familiar with the Job Description and Employment Contract of the CEO?

Yes ☐ No ☐

**E3** Do you conduct an annual appraisal of the CEO?

Yes ☐ No ☐

**E4** Do you conduct the annual salary review of the CEO?

Yes ☐ No ☐

**E5** Who determines the salaries and salary increases of other staff?

**E6** Are there clear lines of reporting between you and the CEO?

Yes ☐ No ☐

**E7** Is there a clear understanding of division of responsibility of roles of Chair and CEO?

Yes ☐ No ☐

**E8** Is there appropriate and regular communication between you and the CEO?

Yes ☐ No ☐

**E9** Do you have a positive, supportive and constructive relationship with the CEO?

Yes ☐ No ☐

If no, what have you done or intend to do?

**E10** Does the CEO attend Board Meetings? Yes ☐ No ☐

If no, have they asked that they do? Yes ☐ No ☐

**E11** Does the CEO have the right to attend all sub-committee meetings?

Yes ☐ No ☐

**E12** Does the CEO actively have the appropriate space and time to constructively challenge you?

Yes ☐ No ☐

**E13** Is the CEO expected to manage all functions of the organisation even those outside their area of expertise?

Yes ☐ No ☐

**E14** Does the CEO experience interference from Board Members?

Yes ☐ No ☐ Don't Know ☐

**E15** Are all operations of the organisation carried out in a fully accountable and transparent manner?

Yes ☐ No ☐ Don't Know ☐

## SECTION F: ORGANISATION STRUCTURES AND WORKING WITH BRANCHES (IF APPLICABLE)

**F1** Are there clear lines of reporting between the CEO and the Branch CEO(s)/Administrator(s)?

Yes ☐ No ☐ Don't Know ☐

**F2** Are there clear lines of communication between you and the Branch Chair(s)?

Yes ☐ No ☐



**F3** Are branches fundraising using the national Charity Number?

Yes ☐ No ☐ Don't Know ☐

**F4** Is all branch funding and fundraising fully accounted and remitted to HQ?

Yes ☐ No ☐ Don't Know ☐

**F5** Is all funding remitted directly to HQ by statutory agencies and not to a non-incorporated branch?

Yes ☐ No ☐ Don't Know ☐

**F6** Are all operations of all branches carried out in a fully accountable and transparent manner?

Yes ☐ No ☐ Don't Know ☐

**F7** **If you answered No or Don't Know to any of F4 – F6 above,** have you put strategies in place, including PR strategies, to deal with any potential fallout?

Yes ☐ No ☐ Don't Know ☐

**F8** Are you clear about the Income and Expenditure and Balance Sheet implications for the organisation in the event of such fallout?

Yes ☐ No ☐ Don't Know ☐

**F9** In addition to the Board of Directors/Management Committee, does your structure contain any of the following (tick all that apply)?

a.	National Executive	
b.	Branch Executive	
c.	Fundraising Sub-Committee	
d.	Audit Sub-Committee	
e.	Governance Sub-Committee	
f.	Other Sub-Committee(s) (Give details)	
g.	Working Groups (Give details)	

**F10** Our current organisation structures are:

a.	Appropriate	
b.	Aligned to our Strategic Plan	
c.	In need of slight amendment	
d.	Being actively reviewed	
e.	Inappropriate	
f.	In need of radical overhaul	
g.	Currently being changed	

## SECTION G: YOUR ASSESSMENT OF YOUR OWN ROLE

**G1** What is your assessment of the role of the Chair?

**G2** What is your assessment of the skills needed?

**G3** What is your own assessment of your own skills?

	Level of Skill		
	High	Medium	Low
Working with Statutory Bodies			
Strategic Planning			
NGO Governance			
Finance			
Communications and Media			
Fundraising			
Funding			
Knowledge of Policy and Legislation			
Business Development Experience			
Commercial Awareness			
Risk Assessment and Management			
Management			
Management of the Board			

**G4** Do you have any comments you would like to make in relation to your own role as Chair?

**G5** Do you have any comments you would like to make in relation to role of Chair of a Community and Voluntary organisation?

ADDITIONAL COMMENTS:

THANK YOU VERY MUCH FOR COMPLETING THIS SURVEY.  
YOUR ASSISTANCE IS MUCH APPRECIATED AND GREATLY VALUED.





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