Are third sector organisations allowing their pride at recruiting former service users to their boards, to paper over the inherent prejudices that prevent these individuals from taking the lead?

Rachael Smith
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ASKING THE DIFFICULT QUESTIONS

Are third sector organisations allowing their pride at recruiting former service users to their boards, to paper over the inherent prejudices that prevent these individuals from taking the lead?

Participation is widespread and embedded in communities, but inequalities of resources and power means that some people are more likely to be excluded from certain participatory activities.²

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1 Pathways through Participation, (2011), *Pathways through participation: What creates and sustains active citizenship*
This paper aims to tackle the issue of service user leadership through exploring the role of service user trustees within non-executive boards. For over a decade the practise of service user involvement has become embedded within the social sector, the role of service users as leaders, however, remains underexplored and underdeveloped.

Working within this sector for over eight years, the author has supported good quality service user involvement at a variety of levels within an organisation; from service user volunteering, peer research projects and advisory groups through to co-design and co-delivery of services. The principles of placing those who use services at the centre of service development and delivery are increasingly contained within the mission and values of organisations working for social change. At Board level however, whilst the author has observed that organisations may often talk of a desire to recruit service users to their board, she questions the level of action they have taken to support their service users to develop into these leadership roles.

The issue of appointing service user trustees is often underpinned by a caution around tokenistic appointments, concerns over recruiting the ‘usual suspects’ and the complex legal and power dynamics of service users effectively running the service they receive.² For the author, this caution around tokenism and the complexity around service user involvement at board level, can lead Boards to shy away from tackling the issue. The danger is that an organisation may have a healthy culture of service user involvement everywhere but the Board. Through exploring a range of experiences and approaches, it is possible to begin to establish a set of good practise principles that will guide effective service user leadership.

This report recommends investing in a culture of service user leadership through formal inclusion in charitable constitutions supported by a range of systems and processes to ensure that service user leadership is embedded and sustained within an organisation. It believes that it is not enough to develop a range of involvement opportunities throughout the organisation without the same opportunities being available at Board level. It challenges Boards to explore their organisation’s approach to service user leadership:

- Ask the difficult questions
- Be ambitious
- Hold yourself to account

² The Charity Commission (2012): Users on Board: Beneficiaries who become trustees
Methodology

This research project focusses on the experiences of service user representation at board level; exploring the tension between the belief that service user representation is essential to forming an authentic board and the fear that, in reality, it may be tokenistic, leading to a poor experience for both the organisation and the participant.

We might use the terms ‘service user’, ‘previous service user’, ‘lived experience’, ‘experts by experience’ and ‘beneficiary’ interchangeably, depending on the context. The issue of language will be addressed later in this paper but, for the purpose of brevity, service user will be used throughout.

Four organisations were selected to participate in this research project: Clinks, Drugscope, Homeless Link and Mind. The MEAM coalition\(^3\) was identified as an interesting sample group due to a shared client group yet operating in different statutory service environments, providing for relevant comparisons without becoming bogged down with specific commissioning conditions. Their role as membership organisations, promoting best practice within their membership alongside influencing national policy, provides for increasing the impact of this research. The study is not be of the coalition itself.

\(^3\) [http://meam.org.uk](http://meam.org.uk)
Clinks:
National membership organisation which supports, represents and campaigns for the voluntary sector working with offenders. Clinks aims to ensure the sector and all those with whom they work, are informed and engaged in order to transform the lives of offenders.

Drugscope:
Leading UK charity supporting drug and alcohol professionals including providing independent information on drugs and drug related issues.

Homeless Link:
The national membership charity for organisations working directly with people who become homeless in England. Working to make services better and campaign for policy change that will help end homelessness.

Mind:
Membership organisation in England and Wales providing advice and support to empower anyone experiencing a mental health problem. Campaigning to improve services, raise awareness and promote understanding.

Two sets of first person interviews were conducted; firstly the leadership team of each organisation (CEO and Chair) were interviewed to document and explore experiences including; the discussions, the recruitment process and the impact of the service user’s (or potentially users’) experience on the board and on the organisation. The interviews explored what the team anticipated and what actually happened using a set of nine questions. Leadership teams were asked to identify a service user, currently sitting on the Board, for a subsequent interview. New questions were designed to draw out their personal experience of the process the previous interview has described. Two sets of interviews took place with Clinks, Drugscope and Mind; with only the leadership team from Homeless Link interviewed due to the timeframe (see Appendix A for a full list of interview questions and participants).

This report is written as part of the author’s Clore Social Fellowship. Each Fellow is given the opportunity to undertake a piece of practice-based research, as part of their Clore Social Leadership Programme. The purpose of this project is to provoke a wider discussion across the sector as a whole.
Underpinning this research paper is the author’s belief that it is essential to support effective service user leadership within the organisational governance structure, that meaningful user involvement is intrinsically beneficial to the work of the social sector. However, “whilst the rhetoric of service user involvement may be very positive, there remain questions as to its nature, impact and benefits.” The question is whether this is a widely shared belief and, in practise, does it work.

Do you believe it is essential for your network member organisations to have a service user representative on your board?

This question sought to establish each interviewee’s position with regards to service user representation and revealed a unanimously positive response. For most, this came with a caveat, a ‘Yes, but’, but for one, a service user trustee, it would not just be one service user but service users.

“[T]he collective experience of people with mental health problems has to be at the heart of what you do ... and therefore that means it has to be at the heart of your leadership, and if you don’t do that, then I don’t think you can properly serve your beneficiary group.”

Chair

For the organisations interviewed, the importance of service user trustees was grounded in the issues of credibility, inclusion, the embodiment of organisational values but also effectiveness and ability to influence policy makers.

“If you are providing a service then your governance structure should have space for and reflect the people that you are providing the services for, experts by experience.”

CEO

“It is not about being liberal or soft or anything else, it is just about how do you understand the system you operate better.”

CEO

This question also established that these organisations are acutely aware of the dangers of tokenism and the need to ‘do it properly’. Six of the seven interviews referenced tokenistic appointments within the first five minutes of the interview either referring directly to ‘tokenism’, ‘box ticking’ or the need to avoid arbitrary service user representation. For two Trustees, this caution was grounded in personal experience.
“I have noticed that on boards in general it can be very tokenistic in the way that they might want to bring a service user onto the board.”
Trustee

“If it starts getting into the territory of nobody here has used one of our services, let’s push somebody onto the board and they are the service user rep that’s probably less valuable.”
Chair

It is interesting to note how this belief translates into action. Out of the four organisations interviewed, only Mind actively monitored whether their trustees had lived experience. They also monitored the involvement of people with lived experience, and service users, on the boards of the Local Minds network.

Mind’s constitution requires over 50% of trustees to have lived experience and the network agreed to a minimum of two trustees with lived experience.

Over 70% of the national Board has lived experience, and of the 151 Local Minds, 24% operate a Board where over 50% have lived experience and 32% have a Board where over 25% of trustees have direct experience of using Mind services.

For the CEO of Homeless Link, participating in this research was an opportunity to shine a light on the level of service user representation throughout their network. Data is collected only through the monitoring requirements of the Homeless Transition Fund and of the 170 organisations funded, 12 have a service user on their board. Homeless Link have recently recruited and appointed two service user trustees to a Board of ten.

“I am a bit disappointed to discover that there are only 12 out of the 170 frontline delivery organisations that have service user representation on the Board, but that is not to say they don’t have other mechanisms.”
CEO

Drugscope and Clinks each had one trustee with lived experience, perhaps two, but neither monitored the level of representation, nor did they have any formal inclusion within their governance structure. Both organisations reflected on the fact they actively support effective service user involvement for service delivery through producing information and guidance.
For the interviewees, the service user trustees were valued for the positive impact they have. They suggested that the unique perspective, or lens of experience, individuals bring to decision making process can keep a Board focussed, prevent mission drift, grounding strategic discussions in reality and ensuring the service user experience remains a priority, even in difficult times.

“It keeps the organisation grounded and is going to ensure that basically, what is important to the service users, the issues that are really important to service users, are that they don’t slip down the agenda so that the influencing work really reflects the priorities of people with lived experience.”

Trustee

“I think the nature of those conversations is the lens that people apply to the decision making process so that where it is appropriate … they apply their involvement and engagement with the issue through the lens of their lived experience.”

CEO

“I am able to give personal experiences … I can give examples of other people and often these experiences relate to my own personal experiences, so I can reinforce those arguments.”

Trustee

Service user trustees can also play a role in developing an organisational culture of service user involvement. By recruiting a service user trustee, organisations make a public declaration that they are moving away from service users being ‘done to’ to working together and that can change the scale of ambition in this area.

“[N]ext year … we are not going just going to have one service user speaker at the conference, we want service user voice in every workshop, in every debate, in every master class, in every session of the conference.”

CEO

It is not only the organisation that benefits, the Trustees themselves were passionate about the personal growth and skills development they had experienced through their role as a trustee. They each reflected that the role of service user trustees should be more visible to inspire others that taking on such a leadership role is possible.

“If you think, look that person was languishing on an acute ward ten years ago, if they have done it well actually maybe I can do that.”

Trustee
How to get it right

“There is no ‘best’ form of user involvement. It is a matter of deciding what is most suitable for a particular charity and its users at any one time.”

The issues of timing, organisational development, the state of good governance and the individual story or history of each sector, organisation or individual, were central to each interview. Whilst this report cannot provide a set of recommendations on the best way to approach developing and supporting the role of service user trustees, it can demonstrate the value of this process. If an organisation’s Board believes in the rhetoric, that the service user voice should run throughout the organisation, it is important not to shy away from the difficult questions, but to work through them and be comfortable with identifying an approach that works for them, at that time.

“There needs to be a really intelligent way of looking at the nature of your organisation, what is does and what a user would contribute to it by being on that board.”

Chair

5 The Charity Commission (2012), as above
5 Questions Boards should ask themselves to enable effective service user leadership.

I. What is the current objective for service user leadership?

The Board’s first step should be to dig beneath the rhetoric. Fully exploring why they want service users on your Board is key to unlocking how they should do it and to avoiding a tokenistic appointment. Having them on the Board may increase its effectiveness, provide renewed energy, accountability, authenticity, and the agency of beneficiaries. But you may find there are other motivations that feel less comfortable, less justifiable; funder requirements, beneficiary expectations and marketing opportunities. They all need to be on the list. Boards need to be honest with themselves. Prioritise this list of motivations and then identify the gaps in skills and experience that will be filled by recruiting beneficiaries to the Board. At the same time ask, why is the service user doing it? What’s in it for them? A similar long list will appear; a mix of personal development and desire to make a difference. Answering this question will help them decide the most appropriate mechanisms for your beneficiaries to have a voice on the Board. These mechanisms will depend on:

1) Organisational approach
2) Method of recruitment
3) Governance structure

The choices Boards make around how they recruit a service user to their Board are linked to organisational approach and attitude to service user leadership; how they approach recruitment; and whether they will subsequently integrate it into your wider governance structure.

Within the sample group, only Homeless Link could be described as taking a representational approach, holding elections to recruit two service user trustees who had used services and had retained a link with services. Mind’s election process, from within the Mind Membership, could be described as indirect representation as many members have their own lived experience. Mind also has a requirement for a minimum of 50% of the Board to have experienced mental health problems. Neither organisation place any formal expectation on the individual to act as a representative but placed emphasis on the unique perspective the individual brings to the Board.

“[I]t is that experience, the lived experience that people bring to participating and leading those organisations that is really critical.”
CEO
Trustees who were not elected were cautious of being cast as ‘representatives’, conscious of the limits of being the token service user.

“I think it is important that the people that are on the Board are capable and also able to input at more levels than just being a service user representative, if that makes sense.”
Trustee

“I think if you’re filling an essential role then you are not doing it for the reasons you might otherwise do it, which is because you want to put something back, because you have some pertinent things to say that might help the group, the Board, whatever, along.”
Trustee

The one elected Trustee interviewed felt a level of responsibility to keep abreast of the issues faced by the wider beneficiary group. This reflects that an elected trustee has to seek the support of a constituency in order to win an election and prove their ability to communicate with and relate to the wider beneficiary group. Whilst elections are expensive, both Mind and Homeless Link were positive about the benefits of a well-run election process and neither had any trouble recruiting service user Trustees using this method.

Drugscope and Clinks adopted the alternative option, to co-opt or invite individuals to apply. With no formal role for service users in their governance structure, they both take a more organic approach and neither trustee was specifically recruited due to their personal experience. It’s interesting to consider that this group of interviewees demonstrated a much greater level of concern regarding tokenistic appointments and whether the transparency of an election process can mitigate these concerns.

Despite some of the structural differences, this sample group’s approach to service user leadership may be best described as inclusive. They are focussed on the importance of a culture in which personal experience is key to organisational effectiveness. When asked whether service user representation at Board level is essential, interviewees suggested an inclusive approach was key for credibility but also for increased effectiveness and to set the cultural tone of inclusion both within the organisation and society more broadly.
As umbrella organisations, with little involvement in direct service delivery, all four leadership teams noted it may be different for service delivery organisations. Perhaps the representative approach is more appropriate for an organisation whose primary objective is increased accountability for the quality of services they offer. As one interviewee noted, the decisions in these boardrooms directly impact the service user experience and the role of service users here is to act as a conscience. The danger is to put too much pressure or emphasis on the voice of one or two people to the detriment of achieving your original objective:

“[B]oards, I think if they act in isolation from any kind of user influence, that it may be more likely to make ... decisions to the detriment of service users without the accountability.”
CEO

“[I]f you have one or two people whose role within the Board is to articulate service user experience, [the challenge] is how to ensure they reflect the range of that experience.”
CEO

“[I]f you don’t get the numbers it is too challenging for them to be holding staff to account all the time as a single person, you know”.
Trustee

The inclusive approach reflects the broader goals for service user leadership; of social inclusion, personal development and systemic change. Trustees interviewed consistently referred to their role as leaders inspiring others to believe in their own capabilities, that they are not defined by their experiences but can develop through them. They focus on lived experience as a lens not a label.

“My past now, it has been a good while, doesn’t diminish, I don’t know if that is the right word, but it doesn’t diminish my capabilities. It actually contributes to my capabilities...”

“It is showing that you can be in a leadership role ... Because that is a hugely powerful message for people who are still not quite so far along the recovery journey.”

“I am quite capable of understanding what is going on. I am quite capable of feeding back and I will feedback from the point of view of somebody who has been through it.”
Trustees

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6 Mind delivers services through the Local Mind Network alongside facilitating peer support services through the Elefriends network.
2. What impact do you want service user leadership to have on your decision making?

When Boards choose to involve beneficiaries in strategic decision making they should be clear about the intended impact. You may be seeking a subtle sense of personal experience which will keep conversations grounded and relevant. Or it may be an explicit desire to be advised by an expert by experience and fill an evident gap in knowledge. It is equally important to consider whether you intend to increase the perceived authenticity of your Board among internal and external audiences. Trustees who speak from direct experience can increase an organisation’s ability to influence policy makers and practitioners whilst giving other beneficiaries the confidence that decisions have been taken with and through their peers. Answering this question will help Boards decide and define who they need to join the Board to have the desired impact.

1) Who?
2) How many?
3) Which skills and experience are needed?

“The words we use to describe those who use our services are, at one level, metaphors that indicate how we conceive them. At another level such labels operate discursively, constructing both the relationship and attendant identities of people participating in the relationships, inducing very practical and material outcomes (McDonald, 2006, p. 115).”

Defining the intended impact will identify the best person for the job. If you are seeking to gain influence to change current policies, is it appropriate to be referencing experiences from ten or fifteen years ago? If you are seeking greater understanding of the quality of your services, how will having a trustee with lived experience but no direct experience of your services help? If it’s about personal development and individual progression, does the service user label hinder that progression? We might use the terms ‘service user’, ‘lived experience’, ‘experts by experience’ and ‘beneficiary’ interchangeably, depending on the context. Whilst there was broad support for beneficiaries to sit on Boards, the different approaches become more pronounced when the language changes which suggests an organisation needs terminology which accurately reflects their intentions.

“This gets us immediately into the question about who is or isn’t a service user and I think the easiest terminology, though it is not as neat, not as attractive maybe, is beneficiary … and I think it is absolutely essential for beneficiary representation to be on local and national Boards in these cases.”

CEO

Consider the different implications of recruiting these individuals to the Board; current service user / ex-service user / individual with lived experience / individual with lived experience through a family member
The language that organisations use to describe this individual also outlines the skills and experience they will bring to the Board. It is tempting to skim over the question of language as political correctness, an unnecessary focus that it takes away from the fact they are a trustee first and foremost. However, can the potential impact of this trustee be fully realised without first understanding what it is about their personal experience that is valued?

For example, Mind has a long history of valuing the voice of people with lived experience of mental health problems. It has an anti-stigma campaign which emphasises that one in four adults experience mental health problems each year and that looking after your mental health and wellbeing is important for everyone, throughout their lives.\(^7\)

“If you’re working in the field of mental health, given the prevalence of people with mental health problems, if they have a Board that was made up entirely of people who have never experienced that I would find it very bizarre.”
Chair

This explains Mind’s decision to have a governance structure in which 50% of trustees must have lived experience as both desirable in order to have the intended impact on stigma. And it has proved achievable, with over 70% of Mind’s current trustees having lived experience.

Conversely, Homeless Link decided to create two new posts for service user trustees who retain a link to these services and have ongoing access to the necessary support.

“[H]omelessness is a kind of temporary situation, it is not like a physical disability … You know people come in and out of services, also people arrive at services at the point in which their lives are basically f***** up.”
CEO

This dose of realism suggests experience of services is valuable, but also complex. This supports the decision to create two posts, reducing the pressure on any one individual and manage absences without negatively impact the effectiveness of the Board.

If this valued experience is left undefined, its potential may not be fully realised. It is interesting to note that both organisations that did not have a fully expressed role for service user trustees, felt they were had some way to go to in order to realise their ambitions in this area. One CEO observed the decline in service user trustees from 50% when the organisation first started to just over 10% today.

\(^7\) [http://www.time-to-change.org.uk](http://www.time-to-change.org.uk)
3. What are the specific challenges for your service users to sit on your Board?

Many Boards will be aware that service users may face challenges or barriers which will make it more difficult to take on a trustee role. They are likely to be unique to their individual circumstances, and your organisation is likely to be well placed to identify, understand and try to overcome them. Overcoming stigma, appropriate support, capacity building through developing skills and experience and celebrating diversity are key to enabling people to reach their potential. These are the values that underpin organisations working for social change, including the Board.

“Oh come on, these are your people, you chose to do this work, you chose to engage with this client group, you can’t then say that you don’t value their (contribution).”
CEO

Through identifying the barriers to their beneficiaries joining the Board you will identify what adaptations to your processes and support, if any, should be put in place to overcome them.

1) Application process
2) Induction and support
3) The meetings themselves
4) Skills development

Striking the balance between not ‘making allowances’ and offering an appropriate level of support, were issues raised by all those interviewed. The leadership team from each organisation interviewed described a set of challenges which relate specifically to their beneficiaries. They ranged from raised awareness of a person’s mental health needs to the implications of being a trustee with a criminal conviction or recruiting people who are in treatment for a drug or alcohol addiction. When asked whether any specific adaptations had been made in light of these challenges, CEO’s and Chairs were consistent about the importance of good governance, good Chairing, with one organisation reflecting that putting resource into a governance manager helps.

“[T]he Chair does interviews with all of our Board members on an annual basis … but that is just good chairing really, it is not particularly service user engagement in any way.”
CEO

“[M]ost of the support that people need comes under the heading of good governance so things like conversation with the chair, good communication, mentoring, buddy approaches etc. It is just good governance.”
CEO
“It’s like employing ex-users. ... It is about ensuring there is support because of issues around the workplace and there is support they might need but actually they can’t be treated any different in terms of actually doing their job ... It is the same with being a trustee.”
Chair

Trustee interviewees also recognised the value of good governance, good Chairing and good relationships with other trustees but placed greater emphasis on the need for induction, training and development. This was referenced by only one of the four leadership teams. Only one Trustee completed an application form, which they felt was not overly arduous., but they did reflect that the criteria for trustees has changed and they weren’t confident their application would be successful today, questioning whether this really supports beneficiary leadership.

“[M]aybe we shouldn’t be talking about making allowances but maybe we should be looking at a different skill set and people who bring different strengths, maybe making allowances is a slightly negative way of looking at it, maybe we should be looking at the positives that person can bring that other people don’t offer.”
Trustee

“If someone met you and talked to you and discussed what your strengths and potential weaknesses might be and where you would perhaps need some extra support to bring out the best in yourself ... more targeted training other than just the kind of fairly standard induction.”
Trustee

“[S]ometimes the voice of lived experience is quite raw and challenging and there is a tendency for process to try and manage that out of the discussion and it is an interesting issue ... how induction and support is a way of empowering service user participation.”
CEO

Interviewees suggested that if personal experience is to be an asset to the organisation, space has to be made on the agenda and support provided for them to fully realise that potential. If they are treated just like all other trustees, what’s the difference, the added value?

“I used to wear a suit to do my presentations as a service user ... a contradiction because the service user was expected to be a junkie in a stairwell...so I recognise that doing that I could be seen to be sort of institutionalised. That (I) have been tamed.”
Trustee
4. What is the environment in which you are asking service users to take the lead?

If service user trustees are to have the best chance of succeeding in their role, to have the desired impact on the work of an organisation, an appropriate change management process is needed. One that takes into account the challenges that need to be overcome, internally and externally, to get this right. How healthy is the current socio-political environment for service user leadership? Consider the level of service user representation across the sector and whether this has a positive or negative reputation, whether you’re coming late to the party or are a trailblazer. Be aware of the financial environment and its impact on decision making, not forgetting the expectations of your key stakeholders for service user involvement. Alongside this, and intrinsically linked, is the health of the Board.

“You don’t want people to walk into some lion’s den type situation especially if it is their first experience of working at strategic level. It has got to be safe, healthy, constructive, positive.”

CEO

Understanding the environment beneficiaries are being asked to join will set the pace of development and effectively manage expectations.

1) Internal challenges
2) External challenges

Interviewees emphasised the importance of good Chairing as a first step towards effective service user leadership at Board level. Both Homeless Link and Mind took the decision to formalise the role of beneficiaries as trustees as part of a governance review.

“You don’t just do it for the sake of it, you do it when it is right for the organisation in terms of its governance ... otherwise you won’t be able to look after any new trustees that comes in.”

Chair

Timing is key and Boards must be prepared for a potentially painful process as they begin to define the role. The idea of the role of service user trustees may be universally supported but this process may magnify the differing perspectives held across the Board and the organisation more widely.

Some interviewees raised concerns that when organisations are operating in a difficult economic environment, discussions become focussed around financial modelling, and that this may affect the quality of the debate with service user priorities slipping down the agenda.
The attitude towards service users and service user involvement of each sector more broadly, was also raised as a key issue. Lived experience representation is well established within the mental health sector with Mind hosting its first ‘lived experience conference’ 25 years ago. There is a significant body of literature on the benefits of peer research and the sector recognises the important role of experts by experience in shaping services. The sector’s positive perception of service user leadership eases the way for people with lived experience to become trustees. The establishment of best practise combined with the wide variety of opportunities to be involved supports individuals to gain the skills and experience needed to take on a leadership role.

“[N]ow we think about the service user voice not as something that gives us approval to do things or not, as something that is another hurdle to get past, but as something that is just natural within the organisation and how we think.”
Chair

In contrast, interviewees suggested that the perception of service user leadership is different within the criminal justice sector where the stigma of being an ex-offender acts as an additional barrier to service user leadership.

“(The perception of) some justice professionals where people who have offended never really become safe, they always have to be managed as a potential risk.”
CEO

“[W]hat I found was that if I go in as a service user or the representative people automatically categorise you, pigeon hole you as a particular type of person and when you are speaking they are hearing you through that lens of what they have already decided you are.”
Trustee

Interviewees referenced that high profile, ‘white collar’ criminals such as Vicky Price and Jonathan Aitken do nothing to challenge this view rather they over simplify the transformation process. Both interviewees were conscious of the reputational damage tokenistic, marketing gimmicks can have and the way that impacts the ability for service users to engage in broad policy debates.

These examples illustrate the vastly different environments into which beneficiaries may be taking on a leadership role. Organisations should consider the impact this may have on the individual experience alongside the challenge to achieving the original objective.
5. What can we do to embed SU leadership to make it sustainable? What is your vision for the future of SU leadership?

Understanding the vision for the future of service user leadership will support the process of embedding beneficiary leadership in the culture of an organisation and ensuring the choices Boards are making now will be sustainable. Informed by the environmental factors that have been identified, they may be seeking to develop a wide range of opportunities for service user leadership or to increase the profile of service user leadership that already exists within the organisation or across the sector more broadly. The scale of ambition for service user leadership will inform the investment that is required to realise it.

1) Investing in future leaders (capacity building, training and development)
2) Investing in a culture of service user leadership (systems, planning and support)

Planning for the future will support the legacy of service user leadership, embedding it throughout an organisation. Test the sustainability of current arrangements, identify investment priorities and be open to the new opportunities that will come with this cultural change.

"Why should we expect people to just automatically have the skills required to work at Board level particularly if they have serious mental health challenges and life hasn’t always been so straight forward."
Trustee

Investing in future leaders is key to sustainability. An organisation may have a great trustee, with relevant lived experience, but is it investing in their successor? Is anyone investing in their successor? Each service user trustee identified that it was training they attended over ten years ago that led them to become trustees today.

They each described a journey through advisory panels, committees, more training, employment opportunities and skilled networking before their current position as a trustee. Homeless Link noted that both Service User trustees now work in housing and homelessness services, this was also the case for Drugscope and Clinks. Navigating this complex road to leadership required a high level of skill and understanding. How realistic is it to expect a broad range of beneficiaries to take this path?

“Very unrealistic! The only kinds of ex-prisoners that might think down that way might have been doing something beforehand, you know, your sort of white collared crime type ex-offender.”
Trustee
Interviewees felt that accessing good quality training had improved their confidence, demystified the process of service improvement and supported their ability to think strategically and therefore contribute more effectively at board level.

“I have sat on so many different boards ... where you see a service user or whatever you want to call that person but it is clear why they are there ... You look at it and you [think] this doesn't look good. The least they should have done is trained that person to have an understanding of what the role of this board is.”
Trustee

When deciding how to invest in the training and development of service user leaders, consider the organisation’s strategic priorities or it may be a struggle to find funding, as was the experience of one interviewee. For example, the decision may come as part of a wider strategic intention around leadership within the community, a focus on employment and skills or a collaboration with other strategic partners. There are a range of approaches to developing the capacity of service users to take on leadership roles, it doesn’t have to have bells and whistles on. As one interviewee suggested, the simplest, cheapest and most inclusive approach could be to run joint training programmes for staff and service users. Developing the skills of service users supports succession planning alongside increasing the impact of service users on the board. This report suggests the question is not should you invest but when and how.

“In general I think that lived experience can enhance the work and contribution significantly but you need that other knowledge; of strategic understanding and the policy understanding for the lived experience to be able to have an impact.”
Trustee

Throughout the interviews, it became clear that once service user leadership is established on the board, the scale of ambition can and will increase. Mind and Homeless Link each described an ongoing journey towards a framework of engagement opportunities, at a number of different levels that are built around what individual service users wants to do rather than what the organisation needs. This is mirrored by the ambitions of the Trustees themselves, to be visible, to inspire others to believe in themselves.

“[W]e have to invest in that, we have to nurture and support and enable and encourage people to see their ability as a leader.”
CEO
The principles of supporting good quality service user leadership

This report identifies a range of approaches that an organisation can adopt in order to support good quality service user leadership. It highlights the importance of actively exploring these options to identify why, who and what the role is for service user leadership within an organisation. It recommends the conscious inclusion of service users within your leadership development plans; avoiding tokenistic appointments whilst ensuring that service users are effectively supported to take on leadership roles at all levels.

Through the range of experiences and approaches explored in this paper, it is possible to begin to establish a set of good practice principles that will guide effective service user leadership.

1. Conscious inclusion of service users within organisational governance structures
2. An open and transparent application process
3. The value of lived experience is explicit within role descriptions and skills audits
4. Induction and training process meets the needs of the individual and the organisation
5. Self-awareness of the Board and the sector in which they operate
6. Aim for a range of flexible opportunities for service user leadership
7. Invest in the training and development of future service user leaders
Due to the small size of this sample group, this report recommends further development of the principles of supporting good quality service user leadership to establish a body of work with a similar breadth and depth that is available for effective service user involvement.

This report recommends investing in a culture of service user leadership through formal inclusion in charitable constitutions supported by a range of systems and processes to ensure that service user leadership is embedded and sustained within an organisation. It believes that it is not enough to develop a range of involvement opportunities throughout the organisation without the same opportunities being available at Board level. It challenges Boards to explore their organisation’s approach to service user leadership:

- Ask the difficult questions
- Be ambitious
- Hold yourself to account
Appendix A

Interview questions: Set 1 (Leadership Teams)

- Do you believe it is essential for your network member organisations to have a service user representative on their board?

- In what way is service user or lived experience representation an issue for you?

- Describe the current involvement of service users on your board.

- How did your organisation move towards this current level of involvement? What discussions took place, how popular were these actions?

- Have you fulfilled your original ambitions?

- Describe the impact this has on your board? Has this influenced your decisions? Has it changed the way you work together?

- What are the benefits of service users sitting on your board?

- What is the future of service user leadership within your organisation?

Interviewees

**Clinks:**
- Clive Martin (CEO)
- Steve Rawlins (Trustee)
  - www.clinks.org.uk

**Drugscope:**
- Marcus Roberts (CEO)
- Colin Standfield (Trustee)
  - www.drugscope.org.uk

**Homeless Link:**
- Ann Skinner (Chair)
- Rick Henderson (CEO)
  - www.homeless.org.uk

**Mind:**
- Ryan Campbell (Chair)
- Paul Farmer (CEO)
- Sarah Rae (Trustee)
  - www.mind.org.uk
Appendix B

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