

Appendix 1 – Training Update

Cabinet Committee – Group Company Governance Report providing an Update On Training Activities

Trust and Charity Event – Thursday 24 October 2019

Overview

- The Basic Trust and Charity training event took place on Thursday 24 October.
- The event was well attended with a total of 45 attendees on the day. Of these, 21 were Members (including three members of the Trusts and Charities Committee and two former members who hold trusteeships). The remaining attendees were made up of officers who are either appointed as a Trustee to an organisation or are involved in this area as part of their daily role.
- The aim of the training was to provide an introduction to Trusts and Charities law and to equip trustees with knowledge and understanding of what that role involves.
- The training content covered the following areas:
 - Eligibility and considerations to take into account before becoming a trustee
 - Trustee duties and responsibilities and how these differ from Directors
 - Personal Liability
 - Issuing Grants
 - Decision making as a Trustee
 - Charitable Structures
 - Charities and Fraud

Feedback

- Attendees were asked to complete a feedback form after the event and of the 37 forms received the majority responded very positively to the training.
- A summary of the feedback received is below
 - 100% of the responses said they found the training to be useful and all rated it at 4 or 5 out of 5
 - Of the 37 responses, 23 declared that their confidence in performing their role relating to charities had improved as a result of the training
 - 100% of the responses were satisfied with the training arrangements and pre-event information
- Many attendees added written comments on the forms, a selection of which are set out below:

'The paperwork distributed is very useful; especially if difficult decisions need scrutinising. The paperwork will act as a catalyst for guidance and advice.'

'I should have had this training 27 years ago.'

'The tutor was very knowledgeable and it was good to have PowerPoint slides to recap and reflect.'

'Lots of good examples highlighting the point.'

'Provided useful background, in particular the issue of conflicts.'

'I am more aware of responsibilities.'

'The training was informative – especially in our role as finance at BCC in compiling yearly Trust/Charity Accounts.'

'My knowledge and awareness has increased.'

'Plenty of questions to take up with my organisation.'

'Excellent speaker.'

'Opened up a train of thought for the future.'

'Really worthwhile.'

'Very well presented and explained.'

'Practical examples helped – good presentation.'

'Details on public benefit helped.'

'Better understanding of the overall framework of law and clarity of roles.'

'Additional knowledge of what is expected of me as a trustee.'

1:1 Sessions

- A 1:1 training session was provided to an Assistant Director in the Inclusive Growth directorate who has been newly appointed as a Director to the company Birmingham Airport Holdings Limited.

Future Pipeline Training Activities

- Further 1:1 sessions will be carried out as required, particularly in relation to staff changes within Inclusive Growth and the new directorships which will be required as a result of this.
- Feedback received from the Trustee training event requested that some training on GDPR would be helpful. The Committee may wish to give further consideration to this.
- A request for regular refresher 'Trusts and Charities' training was also made which can be incorporated going forward
- The Trusts and Charities Committee have shown an interest in having a repeat session in the new year of the recent Trusts and Charities Training with the same provider. Their legal representative is liaising directly but it may be an opportunity to invite again those who could not attend the first session.

- A second 'Director's Roles and Responsibilities' training session is anticipated for the new year to follow the first session in January 2019. This will act as a refresher for those who wish to attend again as well as a mop up session for non-attendee first time round.
- Further consideration is being given to some Commercial Director training for directors of the most 'high profile' companies the Council is involved with. This would involve training from a Commercial Director and a Health and Safety expert. It would be at a higher level than the roles and responsibilities training