

Debra Allcock Tyler

Sample chapter



IT'S A BATTLE ON THE BOARD

The no-fibbing guide for trustees



What they said about the book ...

‘Good governance is about more than process – it’s also about people. This book “written by a human being for human beings”, helps us put trust back into trustee relationships.’

Vicky Browning, Chief Executive, ACEVO

‘This is a refreshing read. It reveals so imaginatively the human side of being a trustee and what that means in a charity board setting. It’s practical as well, with a plethora of useful checklists, tips and advice. It *had* to be Debra to write such a ground-breaking book!’

Rosie Chapman, Governance Consultant

‘Debra Allcock Tyler’s new book on charity governance is like none other on the topic. The style is frank and down to earth. It has very useful good practice materials and concentrates on the all-important people issues that so easily lead to dysfunctional governance. A must for all charity trustees, especially more experienced ones.’

Lindsay Driscoll, former Charity Commissioner and trustee of many and varied charities

‘This book tells it like it is on a charity board and is full of wisdom and practical tips, delivered with Debra’s trademark verve. Even a small dose will make you a better trustee.’

Philip Kirkpatrick, Partner, Head of Charity and Social Enterprise Department, Bates Wells

‘This is a brilliant, personal primer for board members on how to combine best practice and process with emotional intelligence and the human factor. It’s like a long, lively conversation with a warm, empathetic, very experienced and astute fellow trustee.’

Dr Andrew Purkis, Trustee, Directory of Social Change, former Charity Commission board member and former chair or vice-chair of seven UK charities

‘A very practical approach to trusteeship that new as well as experienced trustees will find useful. The real-life examples and references to board behaviours, including the relationship between the board and charity staff, is a welcome guide for charities seeking to build an effective governance team.’

Jacqueline Williams, Leadership and Governance Consultant and Trainer

Debra Allcock Tyler

IT'S A **BATTLE** ON THE **BOARD**

The no-fibbing guide for trustees

dsc

directory of social change

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About the author

Debra is the Chief Executive of the Directory of Social Change (DSC) and has worked in the charity sector for over 35 years. Among numerous other roles, she is currently Vice-President of the Soldiering On Through Life Trust Awards and co-chairs the judging panel with the General the Lord Dannatt. She is also a Trustee of In Kind Direct, one of the Prince's Foundation charities, a Trustee of the Berkshire Community Foundation and an Ambassador for Africa Advocacy Foundation for women and girls at risk of or affected by female genital mutilation. In the past, she has served as a trustee of several charities and was the co-founder and first Chair of the Small Charities Coalition. She was on the Charity Commission's SORP committee for over seven years and the Vice-Chair of Governors of Whiteknights Primary School for six years.

She is a renowned public speaker with many years' experience of training and coaching and an internationally published author of several books on management and leadership, including *It's Tough at the Top*, *The Pleasure and the Pain* and *It's Murder in Management*. Debra has a regular monthly column in *Third Sector* magazine and has appeared on Radio 4's *The Moral Maze*.

About the Directory of Social Change

At the Directory of Social Change (DSC), we believe that the world is made better by people coming together to serve their communities and each other. For us, an independent voluntary sector is at the heart of that social change and we exist to support charities, voluntary organisations and community groups in the work they do. Our role is to:

- **provide practical information** on a range of topics from fundraising to project management in both our printed publications and e-books;
- **offer training** through public courses, events and in-house services;
- **research funders** and maintain a subscription database, *Funds Online*, with details on funding from grant-making charities, companies and government sources;
- **offer bespoke research** to voluntary sector organisations in order to evaluate projects, identify new opportunities and help make sense of existing data;
- **stimulate debate and campaign** on key issues that affect the voluntary sector, particularly to champion the concerns of smaller charities.

We are a registered charity ourselves but we self-fund most of our work. We charge for services, but cross-subsidise those which charities particularly need and cannot easily afford.

Visit our website www.dsc.org.uk to see how we can help you to help others and have a look at www.fundsonline.org.uk to see how DSC could improve your fundraising. Alternatively, call our friendly team at **020 7697 4200** to chat about your needs or drop us a line at cs@dsc.org.uk.

Foreword

As trustees, we often struggle with limited resources. We have to balance difficult and conflicting needs and priorities within frameworks of strategy, policy, regulation, internal structures and compliance – all to ultimately serve significant, essential and heart-breaking causes. Many of us are driven by a passion to achieve social change and that is intertwined with the desire to lead with impact. Effective trustees are creators and drivers in the lives of organisations, and in this arena, relationships matter. Impactful change is not achieved without building healthy and sustainable relationships.

It's a Battle on the Board is a book with a difference. It recognises that self-awareness and emotional, social and cultural intelligence are at the core of exemplary leadership and need to be twinned with collective awareness in a hyper-connected world in which success goes beyond financial sustainability. Speaking from her own experience on the board as a trustee, chair, and chief executive, Debra brings a perspective of humanness to what it means to be a trustee.

As a woman of colour who has served in various trustee and non-executive roles and as a governance professional, I found Debra's take on trusteeship not only stimulating and thoughtful but also a practical, balanced and informative read. It's refreshing to see attention paid to the psychology of decision-making, managing risk and dealing with crisis. As important as it is to know *how* to achieve good governance and leadership, it is equally crucial to know *why*, *what*, *who* and *when*. Debra solves these and many other puzzles that charity boards and executive teams face, demonstrating that they both need to work in tandem.

In the book you'll find two fictional trustees – Ace the Awesome and Dash the Dreadful – who demonstrate how trustees can behave. While I strive to be Ace in all I do, I could also recognise myself somewhere in between the two polarities – depending on what kind of day I'm having! But taking a hard look at yourself is part of the journey. Trustees need to be clear about what they are there for and figure out the ways of working with others to resolve differences and work through conflict. Recognising biases (conscious and unconscious), while creating safe spaces for discussion, dialogue and decision-making are some of the critical anchors to navigate the destructive battles that can occur in the boardroom.

Tesse Akpeki

Fellow of the Chartered Governance Institute

Organisational Health and Person-centred Consultant

Founder of the Wellbeing, Leadership and Resilience Leadership Initiative

1 **One of us is crying:** the challenges of trusteeship

*The greatest of faults, I should say, is to be
conscious of none.* Thomas Carlyle

The chapter title is a line from ABBA's song 'One of Us'. And in this case it is highly likely to be the CEO who sobs into their pillow the night after a meeting of the board of trustees. Meanwhile, the trustee or trustees who caused the grief have probably already completely forgotten all about it and are going about the rest of their lives in blind oblivion to the wreck of a human being they left behind after the meeting. This chapter is about honest self-reflection on when and how things can go wrong and what part you, as a trustee, play.

Outcomes

After reading this chapter you will:

- **Know what people might be saying about you**
- **Understand how you can get things wrong**
- **Realise why trustees are important**

How does it go wrong?

This chapter isn't about when you get it right. This chapter is about the hard truths – the behaviours and attitudes trustees sometimes exhibit which can cause great damage to their charity and the ability of its executive team to get the job done. It's also about how easy it is to totally piss off your fellow trustees, often without having any inkling that this is what you've done.

Now, of course, you may well be a trustee of a very small charity that doesn't employ any staff, or at least very few. So some of the messages in this chapter may not apply directly to you. But there are probably some lessons here that will serve you nonetheless. And even if you already consider yourself to be an excellent trustee, consider this: you will never, ever be told by your CEO or executive team that you are not a good trustee. Even if you ask directly, there is not a cat in hell's chance they will tell you the whole unexpurgated truth. This will be because they're grateful for the very fact that you volunteer (because trustees aren't always that easy to get) and don't want to offend you, or because you don't respond well to criticism, or because they don't feel they have a strong enough relationship with you to be honest, or because they feel their role might be under threat if they say something negative, or even

because they just haven't got the time to have that sort of conversation with you, as it takes thought and preparation.

You are also highly unlikely to be given honest feedback by your fellow trustees, possibly for similar reasons. Many of the trustees who shared their stories with me (as explained in the introduction) admitted that they found it very difficult to give feedback directly to a fellow trustee whom they found challenging. Mostly they either just put up with the problem or relied on the chair to deal with it – which didn't always happen. And sometimes the trustees simply didn't know how to handle the situation with which they were presented. For example, one trustee discovered that the treasurer was having an affair with the finance director and had absolutely no clue how to handle such a sensitive situation. (For the curious, they didn't handle it – the situation finally got out because a member of staff spotted the couple canoodling before a meeting. The whole thing got very messy and ended with both the treasurer and the finance director resigning and two broken marriages.)

So it is quite likely that you will be under the impression that you're good at being a trustee. But it's entirely possible that, actually, you're not nearly as good as you think you are. Nevertheless, most of you of course really do care about getting it right and want to be an excellent trustee. This is because you know that the better you are, the better your charity will be.

What they say about you

When I gathered stories about being a trustee, there were two sorts of people who sent me information. Staff and volunteers at the charities concerned had plenty to say, and of course lots and lots of stories came from trustees talking about each other. This section shares with you some of the very frank views I heard from members of executive teams about trustees and their behaviour towards each other and towards staff and volunteers. And I suspect some of these statements will resonate with you as the themes they contain were very common. Do you know anyone like this? Is it you?!

I am so tired of having to explain the same thing over and over again because they haven't bothered to remind themselves of what we covered last time.

They always assume you've done something wrong.

The only time you ever get feedback on anything you send to them is if it's criticising something. No one ever says 'well done'. And even if they do, it always feels fake as if they feel they ought to say something positive but they don't really believe it.

All they care about is the money. Most of our board meetings they spend all their time hauling you over hot coals about the finances. It seems like they couldn't care less about our clients.

1. One of us is crying: the challenges of trusteeship

He's an arrogant trustee. He's never even been a CEO, or a senior manager, yet he carries on as if he could do a better job than me. He's bloody welcome to it!

He thinks that because he's an investment banker he understands how charity finances work. He hasn't actually got a clue.

Sometimes I wonder what planet they're on. They act as if it's dead easy to raise money. I'd like to see one of them do it.

Well, she's a terrible show-off. Half the time she's just speaking because she likes the sound of her own voice!

It drives me mad how often just one trustee can completely derail an entire agenda by having an opinion about some tiny, irrelevant point. And the others just let them do it.

They're bullies. When everything's going OK they don't say much. But the minute something gets tough they lay into me as if I'm a bloody child who's been found out nicking biscuits from the tin!

They decided they should do a board appraisal. What a joke! The conclusion was that they're awesome but could make some small changes to be even more awesome. They certainly didn't ask any of us what we thought. We could have told them that they're about as far from awesome as they can get.

Sometimes they're OK. More often they spend ages talking about irrelevant details and completely missing the point.

It's so easy to distract them from the real problems. Just give them some numbers that don't add up and they'll spend hours arguing about that. That's OK. That means they don't interfere in the really important stuff and I can just get on with it.

I feel sick every time I know I've got a board meeting coming up. I know that I'm going to come out feeling as if I'm useless.

They don't like each other much.

They accuse me of being defensive. That's always after they've attacked me! What do they expect?

Surely my fellow trustees aren't so negative?

Now, I expected that most of the complaints about board members would come from the executive team as I've seen first hand the damage trustees can cause when they're not getting things right. But I was absolutely gobsmacked to discover that the majority of complaints were from trustees talking about each other! I got the sense from their stories that the individuals had never been able to tackle their issues directly, for all sorts of good reasons I'm sure, and found telling me their tales somewhat cathartic. But again, you should take a look deep into your heart and ask yourself whether any of your fellow trustees might describe you or other trustees on your board similarly!

She is a bit of a know-it-all.

He talks too much – none of us ever get a word in edgewise.

He and the CEO have got it all sewn up – I don't know why they bother holding board meetings.

She closes down every conversation on the board that she doesn't agree with.

He's so patronising. I know I'm new to being a trustee, but I'm not totally stupid.

He pays more attention to [name of another trustee] because he's a bigwig in the city than he does to those of us who actually know something about [charity cause]!

He thinks that because he's on the board of a private sector company he understands about being a trustee.

She speaks to me as if I'm an idiot. I'm reluctant to speak out because I always feel like she's going to put me down if I do. She might be a charity lawyer but that doesn't make her better than me.

She always pulls the line, 'I'm a person with [name of disease/addiction] so I'm better placed than you to know what our beneficiaries need.' As if one person can possibly represent every single person with [name of disease/addiction]!

He's never prepared. And always pulls the 'I'm a volunteer with a busy life' card. As if the rest of us aren't.

Is what they say true?

Probably. At least, it certainly felt to those individuals that their statements were true when they shared their stories with me. In fairness, most of these comments came during or after a very difficult situation or huge breakdown, so the individuals concerned were feeling very vulnerable and sensitive and were letting off steam. But even if that is the case, do you really want your colleagues saying such things about you, whatever the provocation?

And if that's what they're feeling, how easy do you think it's going to be to influence what they subsequently do and how they do it?



Oh dear! Don't they ever say anything good?

Having said all that, of course there were many stories of fellow trustees whom folk liked, admired and felt they could work well with. So here's the other side of the coin:

He's absolutely brilliant. He always assumes you know what you're doing.

It's a Battle on the Board

She never interferes in the operational detail. In fact, at board meetings, when one of the trustees goes off on something detailed, she always stops them and brings them back to the point.

He reads everything and makes a point of saying 'well done' about any particular thing he's noticed in the report.

He always focuses on what we can do to solve stuff rather than banging on about what went wrong. It's so much more empowering.

She responds to every email. That's so rare. Half the time you send out an email to the board and it just disappears into the ether.

He treats me as if I'm an equal.

Board meetings are great fun. You get a lot done, but he always manages to make it seem as if you've had a good time doing it. Even when it's tough, he'll say something to lighten the mood. You end up feeling that you've had a good time but still covered important stuff.

You always feel like she's on your side. That she's got your back. It makes the job so much easier.

He doesn't say much, but when he does, it's always useful and makes you think of things in a different way.

What's the point?

The point is that all of the above quotes focus on relationships. When I asked charity staff or trustees to describe their boards, they almost never talked about how well the board members knew charity law, how good they were at running an AGM, or how well they understood the governing documents of the charity (for example, the trust deed, the constitution, or the memorandum and articles of association – depending on the legal form of the charity)! Their feedback all revolved around how they felt about their interactions with others.

The truth is that you can be absolutely brilliant technically, you can know all there is to know about the Charities SORP (statement of recommended practice) or the latest amendment to the Charities Act, or you can be an expert in your charity's cause (for example, you might know all there is to know about addictions, a medical condition, animal rights or LGBTQ+ issues). But if you can't communicate with your charity staff or your fellow trustees in such a way that they want to listen and, more importantly, want to act on your knowledge, then frankly you may just as well not know anything.

It all comes down to humility. The reality is that there is no way you can possibly know more about the work of your charity, the environment in which it operates or the challenges it faces than the staff do. They are doing that work

every single day (and when they are not doing it, they are still thinking about it!). They deal with the beneficiaries, the volunteers, the funders and everybody else in between. They raise the money, spend the money, count the money and worry about the money. And that's the way it should be. They *ought to* know more than you do. After all, your charity pays them for exactly that reason. Even if you yourself are a beneficiary of your charity, you still won't know it all.

And if you genuinely do think you know more than your charity's staff do, well, then either they're not very good or you need to consider whether perhaps you're being a bit arrogant. Either way, something needs to change so that you have a team of people in your charity who are the experts and who guide and advise you so that you can make the right strategic decisions when you need to.

So what should I do?

You might be thinking, 'Well, if I don't know anything and they don't like me much, why bother being a trustee?' But here's the thing. As a trustee, there are things that only you can do. And I don't mean the regulatory stuff. I'm talking about perspective. Charities gain a massive amount of value from at least some of their trustees being relatively unfamiliar with the details of their operation, and not being fully conversant with the environment or current challenges. Fresh eyes bring fresh questions and fresh perspectives. Even experienced trustees, when they are new to a board, will not be experts in the charity they are joining.

It's always worth remembering that the more detail you know, the harder it can be to remain fully objective. So it's about getting the balance right. You need to know enough of the detail to satisfy yourself that you are governing effectively – but not so much that you are in danger of losing sight of the horizon because you're in the engine room tinkering with the flanges!

The key thing is to recognise the perceived power imbalance between you as the governor of the charity and the staff as the executive team. It can feel to them as if you have all the power – for example, that you can derail plans and activities just by asking for a paper on some trivial detail to be presented at the next board meeting in three months' time. And it can feel to you as if you are blindly reliant on the executive team carrying out the board's wishes and are hampered by the fact that they control the information you get.

So both the trustees and the executive come from positions of perceived weakness – each feels that the other has the power. Acknowledging this openly will go a long way towards creating an environment in which the relationship can flourish.

If it's so hard, why should I bother being a trustee?

I cannot think of a better way of saying why it matters to be a trustee and why you should do it than the introduction in one of the earlier versions of the Charity Commission for England and Wales's guidance *The Essential Trustee*:

What you need to know, what you need to do. Similar messages are also given in guidance from the Charity Commission for Northern Ireland and the Office of the Scottish Charity Regulator.

The message from the regulators is as follows:

Charities exist to create a better society. The range and scope of their work and the variety of people they help is amazing. Whether working locally, nationally or internationally, they have a remarkable history of driving social change which is reflected all around you in the world you live in today.

Charities could do none of this without their trustees. You're probably reading this because you have just become a trustee yourself. If so, we welcome you to this role and thank you for taking it on. The commitment and energy you display will make a direct difference to your charity and everyone it helps. You don't have to be a hero or famous to change lives for the better – trusteeship allows you to do just that.

Being a trustee can be hard work and, for most, it's unpaid. The trustees have the ultimate responsibility for running a charity, for its property, finances and the employment of any staff or volunteers.

But being a trustee is also immensely rewarding, providing both expected and unexpected opportunities for personal development. And while you bring your skills and energy to running your charity you will also find you are gaining new experience and knowledge.

For instance you will help plan the strategic future of the charity and its work, be involved in developing and managing staff and volunteers and make policy decisions for your charity. You will also ensure it's accountable to its beneficiaries, to the Charity Commission and the public in general.

But you won't be on your own. You'll be joining [a community of fellow trustees across the UK]. Effective trustee boards need a range of people with a good mix of skills. The best boards are also diverse, with people who have a real understanding of the needs to be met and others with good financial, business and management experience. The rewards of working with, and learning from, people from different backgrounds and skills will be great.

We hope you will enjoy making a difference to society.

I hope that this book will help you to understand the practical realities of achieving the vision of trusteeship painted above.

Finally

Being a trustee is honestly one of the best things I have ever done. There have been times when I've been frustrated and occasionally I've been angry, and one time I resigned in a huff (which I now regret) – but I never felt it wasn't worthwhile. And there have been times when I've laughed uncontrollably, felt real joy and love, and been truly inspired by the work my colleagues and I did as a charity. So there will be challenging times, but remembering that you are there to serve your community – that you are doing it because it is the right

1. *One of us is crying: the challenges of trusteeship*

thing to do and that society is improving because of your work – well, that makes it all worth it.

My favourite quote of all time, which I use all the time (including in my other books), is one from George Bernard Shaw. It goes:

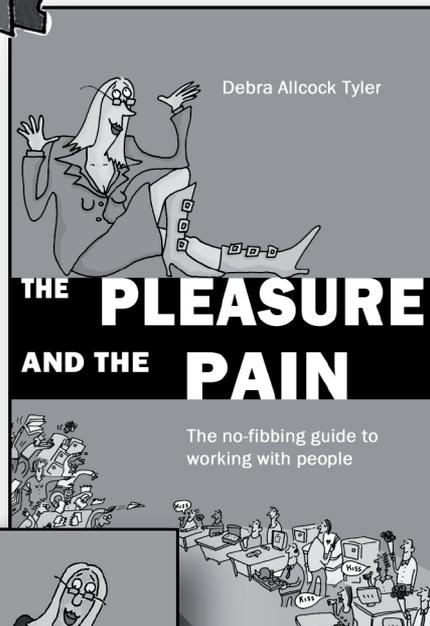
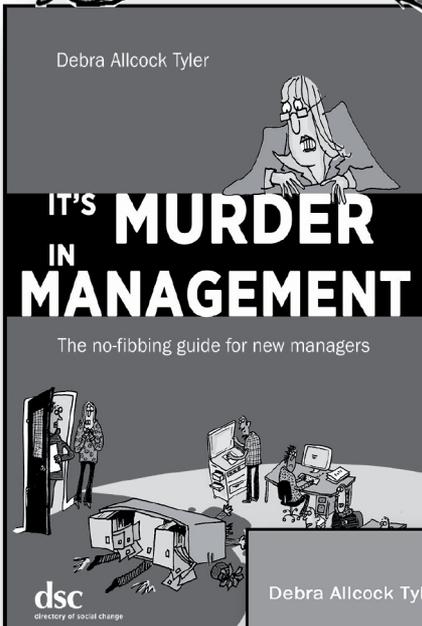
This is the true joy in life, the being used for a purpose recognized by yourself as a mighty one; the being thoroughly worn out before you are thrown on the scrap heap; the being a force of Nature instead of a feverish selfish little clod of ailments and grievances complaining that the world will not devote itself to making you happy. ...

I am of the opinion that my life belongs to the whole community, and as long as I live it is my privilege to do for it whatsoever I can. I want to be thoroughly used up when I die, for the harder I work, the more I live. I rejoice in life for its own sake. Life is no 'brief candle' for me. It is a sort of splendid torch, which I've got hold a of for the moment; and I want to make it burn as brightly as possible before handing it on to future generations.

What would Ace and Dash do?

<i>Ace would...</i>	<i>Dash would...</i>
Think hard about how they come across to others as a trustee	Expect others to change, not them
Understand that they need to make sure their relationships are healthy and effective	Focus on the processes and procedures and ignore the relationships
Ask for and accept feedback on their performance as a trustee	Don't ask for feedback and be defensive when it's given
Remember that they are a governor of the charity, not the boss of its people	Act as if they're the boss

Why not catch up with the rest of the series



www.dsc.org.uk/mur

www.dsc.org.uk/ppn



www.dsc.org.uk/itt

Wouldn't charity governance be so much easier if it weren't for all of your fellow trustees?

Individual knowledge and expertise are important in good governance, but if you don't get the relationship with your fellow trustees right, your charity will suffer and very quickly you'll have a battle on the board.

Debra Allcock Tyler's approach to the challenging subject of trusteeship is characteristically engaging as she adopts a different ABBA tune as the theme for each chapter. Mixing leadership theory with practical advice and real-life examples, she dispenses her wisdom straight from the shoulder.

It includes:

- Understanding your role as a trustee
- Working with fellow trustees and the CEO
- Dealing with information and finance
- The psychology of decision-making
- Managing risk and handling crisis

If you want to be the dancing queen (or king) of good governance and avoid a Waterloo for your charity, then this book is for you.

'This book tells it like it is on a charity board and is full of wisdom and practical tips, delivered with Debra's trademark verve. Even a small dose will make you a better trustee.'

Philip Kirkpatrick

Partner, Head of Charity and Social Enterprise Department, Bates Wells



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