

How to Guide

# Patrons, Presidents and Personalities

Working with high-level volunteers

Eileen Hammond

**DSC**

In association with  
the Institute of Fundraising

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Liz Haigh-Reeve	Director of Fundraising, The Children's Trust
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Rob Jackson	Director of Volunteering Development, Volunteering England
Nina Kapur	Head of PR and Communications, Breakthrough Breast Cancer
Martin Kemp	Film and TV Actor
Linda Laurance	Governance Consultant
Laurence Llewelyn-Bowen	Interior Design Consultant and TV Presenter
Hugo Middlemas	Director of Fundraising, Parkinson's Disease Society
Katrina Tanzer	PA to Celebrities
Tanya Winch	Celebrity and PR Manager, Breakthrough Breast Cancer

# About the author

**EILEEN HAMMOND** has worked in the voluntary sector for 30 years from Area Organiser, and Appeals Director to Chief Executive. She has been involved in the development of a number of new charities, where the recruitment of Patrons, Presidents and celebrities was an important part of raising the profile of the charity to a wider audience. Throughout that time she has also worked as a volunteer for youth organisations, directed amateur musical productions and served periods as President of both local Inner Wheel and Soroptimist Clubs.

A Fellow of the Institute of Fundraising, Eileen is a past Honorary Secretary and currently a member of the Standards Committee which develops the codes of practice for the sector. She is also a Director of the Association of Fundraising Consultants and a Professional Adviser on the Board of Trustees of Barts and The London Charity. With husband Alan, she is now a partner in the charity consultancy, Hammond Associates.

# Foreword

As someone who has worked closely with Patrons, Presidents, and Personalities for over 30 years, I am impressed at how Eileen Hammond has tackled this significant and important area of charity work. My work in the Charity Communications and Fundraising world has always greatly benefited from working with influential people, getting them to help raise funds, enthuse about the cause, and bring new supporters to the organisation.

I am still making new friends and contacts in those areas Eileen has written about because I have seen the results that can be achieved through these relationships. Both NCH and the British Red Cross would be poorer in monetary and promotional terms without having Presidents, Patrons and Personalities, as would many other Charities who value and respect the tremendous support given by these volunteers who ‘make a difference’.

I commend Eileen’s book to all those of us engaged in Charitable events, PR programmes and fundraising. The book is a real learning tool and should be read.

JOHN F GRAY

John is co-author of *Organising Special Events* published by DSC, a founder and Fellow of the Institute of Fundraising and Fellow of the Chartered Institute of Public Relations.

He is past Director of Communications and Fundraising for NCH and the British Red Cross and is now the Chief Executive of UCLH Charitable Foundation.



# Introduction

Imagine the scene: a tavern in London in the year 1865. Two men are seated at a table engaged in earnest discussion when they are joined by a third man with a literary air about him. The conversation, as is common in such establishments, turns to the problems of the age – poverty, the homeless, abandoned children and the host of evils which have blighted society to varying degrees at every stage of its development.

The feature which distinguishes their discussions from those of others around them in the crowded inn is that these three men set in train initiatives which made an immeasurable difference to people whose lives were blighted by the misery and hardship of the social conditions of the day; practical, effective measures that are still saving and improving lives in the twenty-first century.

The three men were the 7th Earl of Shaftesbury, Dr Thomas Barnado and Charles Dickens and, although the meeting described is imaginary, their respective contributions to improvement in social conditions are well known: the charitable establishments founded by the first two and the raising of public awareness brought about by the writings of the third.

What had they in common? First, they were all three passionately concerned, not just about the misery and injustice they saw around them, but also about the need to do something about it. Second, unlike the majority of their contemporaries in the tavern, they were well-known, influential figures in society and, because of this, they were in a position to enlist powerful allies and to organise concerted action in a way which would make a real and sustained difference to the lives of those they sought to help. They were, in short, personalities whom people knew, admired, trusted and were willing to follow.

Today every charity understands the importance of high-profile figures in raising public awareness of its cause and the funds necessary to carry out its work. But among the glittering array of public personalities, who would be the most suitable match for our charity? How do we find them? If we're successful in landing them, what do we do with them? Should we make them patrons or presidents and what's the difference? How do we sustain the relationship? These and many other questions can pose real problems, particularly for smaller or recently formed charities that may have little experience or understanding of how to approach high-profile figures, or of how to use their services effectively, and who frequently have an unrealistic expectation of what such affiliations can achieve for their cause.

Recently, I was approached by the trustees of a comparatively newly established charity who, having set up the necessary governance structure and appointed staff, wanted advice on the subject of patrons and presidents. A meeting was arranged during which it became clear that they expected a brief explanation of what a charity should have in terms of high-level volunteer involvement and a few tips on how to go about getting it – a sort of one-size-fits-all solution. I explained that every charity is unique and that their own requirements would depend upon a number of factors which would need careful consideration. In order to save further consultancy time and cost, I suggested that the best course was to refer them to an appropriate book which would introduce them to the subject and give practical advice on how to proceed. At the end of our meeting, we agreed that I would do some research and let them know of a suitable publication.

However, a search among the lengthy lists of published works on almost every aspect of fundraising revealed a notable absence of any book exclusively about the recruitment and involvement of personalities as patrons, presidents or other high-profile roles in charities.

So here it is.

# 1

## Patrons and presidents

- ▶ Leading figures
- ▶ Why do we need them?
- ▶ When do we need them?
- ▶ What's the difference?
- ▶ Other leading roles

### Leading figures

We all have a pretty good idea of the role of a Chief Executive. Whether the charity is large or small, national or local, the function of the chief executive's office is fundamentally the same. Similarly, the Director of Fundraising, the Finance Director and the Head of Operations are all entrusted with tasks which are implicit in their titles – although those titles may vary slightly from charity to charity. However, there is no such clarity about the roles of Patrons and Presidents or the differences between them. Among the top fifty charities by voluntary income, there are some that have one Patron, others that have well over a hundred; some have a President or Presidents but no Patron; others have a list of Vice-Presidents but no President. There are still other charities that function perfectly well without Patrons and/or Presidents.

At first sight this seems a bewildering maze of inconsistency badly in need of some standardisation. Yet it works. The charity world has never subscribed to the principle of conformity; indeed, every charity was brought into existence to make changes to the existing order of things in order to right a wrong or to meet a need. And they do that, not by conforming to a norm but by taking innovative measures relevant to their own particular

objectives. So this diversity of practice regarding Patrons and Presidents should be seen as an aspect of the freedom each charitable organisation has to organise its affairs in the way it deems most effective in the achievement of its aims.

## **Why do we need them?**

The one thing that can be stated with certainty is that charities benefit from association with leading figures – that is, ‘personalities’ – who are known either to the general public or to the specific section of the public which is of interest to a particular charity and who may be seen as role models whose example others are willing to follow.

Similarly, individuals who are capable of instilling this trust in others can themselves benefit from association with charitable causes. It is interesting to speculate upon how many charities are thriving today because of their famous founders and how many founders became famous because of the charitable causes they espoused. This indicates a symbiotic relationship between charities and their leading figures who, in this book, are referred to generically as ‘Personalities’.

There are stages in the lives and careers of politicians, rock stars, authors, sportsmen, film stars, TV personalities and so on, when they would welcome being associated with a charitable cause. Similarly, charities experience times when the need for credibility, status, public awareness and trust becomes a matter of great importance. Before going on to consider the specific roles that personalities can usefully fill in charitable organisations, we should perhaps look at the optimum timing for charities to become active in seeking the involvement of high-level volunteers.

## **When do we need them?**

The trustees of a former client charity that I had helped during their rather challenging formative years were experiencing difficulties in relating to their chairman. One solution they suggested (in his absence) was that they ‘promote’ him to be Patron of the charity, thus freeing them to appoint another chairman and at the same time providing a Patron to fill the vacant space on their letterhead.

I was obliged to point out two major flaws in this proposal. First, was he an ideal candidate for the role of Patron? Second, what would they do if they

had the opportunity of acquiring a more suitable candidate for the position? The charity was at a crossroads in its development and it was the right time to consider creating roles which could give a lead to the charity beyond that which had been achieved by the founding trustees. However, it was essential that such appointments were made only after careful consideration of where the charity wished to position itself in the public eye, rather than as a knee-jerk reaction to solving the immediate problem as it had initially been perceived.

In fact, that particular difficulty was resolved quite simply when they took up my suggestion and invited him to become a vice-president, along with a few others, thus giving them time to think more strategically about other high-profile roles for the future. But it does highlight the need to look at our organisations objectively and to decide whether the time is right to enlist high-profile figures to help carry us forward.

In most cases, charities are initially set up by committed individuals who have an awareness of an urgent need and the passion to set about meeting it. And that's the way it should be. Whether the founders are well known to the public or not, their commitment to the cause will see them through. At that early stage, the absence of a high-level patron or president is not essential – though it could help!

But most fledgling charities soon find that theirs is a very small voice in a very large and noisy environment and, in order to make themselves known to the people 'out there', they must grow bigger and more noticeable. The need for funding may be pressing; if they are a campaigning organisation, their message has to be communicated; the public has to be made aware of the importance of their cause. In such circumstances, they need a voice which can be heard and this could be supplied by a Personality to whom the public will listen and whose example they will follow.

Periods of growth, particularly in the early stages of a charity's life, are exhilarating. Waves of public support for the cause are a source of inspiration for staff and volunteers alike, motivating them to go the extra mile. Later on, as the charity grows, there are, inevitably, periods of staleness and, at such times, an injection of new blood with its attendant publicity can be just what's needed to rally the troops.

In another sense, it could be said that the best time to recruit Personalities is when the charity is riding high. A successful and active organisation is a far more attractive prospect than one whose staff is demotivated and

whose trustees are becoming tired and less inclined to devote time and energy to a cause that they may feel is making little progress.

As we shall see later, another key consideration in deciding when to approach a particular individual is that of timing, which is also important to Personalities. They too have high points and low points in their lives and their careers, and they are more likely to respond to your request if it fits in well with their own plans and aspirations.

Still, whenever the appropriate time comes to think about bringing high-profile Personalities on board, it is important to be clear as to what is meant by Patrons and Presidents. As we've seen, charities differ widely in their interpretation of these terms but there are certain core principles that can be used to guide and inform your discussions about what is right for your particular organisation.

## **What's the difference?**

### **Patrons**

The *Concise Oxford Dictionary* defines a patron as (among other things) 'a distinguished person who takes an honorary position in a charity'. Unlike trustees, patrons have no legal status or binding obligations. Neither do they have any responsibility for the management of the organisation or the manner in which funds are spent. Their role is, in most cases, that of a 'figurehead' or 'flag bearer', a leader whose example people are willing to follow and whose name can lend credibility and status to the organisation which, in turn, can increase the effectiveness of its fundraising, campaigning and public relations activities. A distinguished patron can also, in certain circumstances, provide high-level entry to powerful organisations and institutions, to which the charity might not otherwise have access.

While, if chosen with careful consideration, a patron can be a great asset to a charity on an ongoing and developing basis, in most cases, his or her role demands little 'hands-on' involvement. Their sympathy with the cause and approval of the charity's work is demonstrated publicly by their name on the letterhead and reinforced by the occasional appearance at an event.

In many cases, the appointment of a patron (particularly a member of the Royal Family) is on an ongoing and more or less permanent basis and the charity benefits from the resultant sense of continuity and stability.

Some charities have a cautious attitude to the appointment of patrons, believing that there may be a possibility of the appointee becoming too actively involved and thereby creating, in effect, an additional tier of management. Chief executives, for instance, who have learned to deal effectively with their trustees, may be reluctant to begin the same process with patrons. Nonetheless, it is the case that most patrons are content to allow the use of their name and therefore, by implication, their support and approval without becoming physically involved in the charities' activities. Any fears concerning excessive or unwanted involvement in the charity's affairs can be allayed by the process of giving careful consideration to the manner of appointment and the form of the agreement between charity and patron.

However, some charities make a number of appointments, drawing a distinction between 'The Patron' and other patrons who can be asked to support a particular campaign or help raise the profile of the charity for a limited period.

## Presidents

'The Head of a Society, council or other organisation.' This definition (again taken from the *Concise Oxford Dictionary*) makes clear that the role of a president is a more 'hands-on' role than that of a patron. Because of this, it is important that the person appointed should have credibility and relevance within the area of the charity's core activity, thus enhancing the charity's profile among appropriate audiences. An example of this is provided by The Encephalitis Society whose Patron, Martin Kemp, brings the charity to the attention of the media and the general public, while their recently appointed President, Professor Barbara Wilson OBE, brings the gravitas and professional credibility that the charity needs within the medical profession.

The distinction between the roles of trustees and presidents is very important. Very occasionally, the governing document of a charity will stipulate that the president should also fulfil the role of chair of the board of trustees. Governance consultant, Linda Laurance, advises that, in such cases, it is essential to identify which 'hat' is being worn and when, since he or she will carry all the responsibilities of trusteeship when acting in the role of chair, but not when acting in their capacity as president.

It would seem that in practice the roles of patron and president can be very similar – it is down to the individual charity to decide whether they

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