

Debra Allcock Tyler



IT'S A BATTLE ON THE BOARD

The no-fibbing guide for trustees



dsc
directory of social change

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

‘I absolutely loved it. It was a stonking read. If you want to excel at being a trustee, read this book. For new trustees and old hands alike, it’s full of food for thought on avoiding the behaviours which compromise the very charity that you’re meant to be supporting. It will help you to become a more humble trustee – one that understands their role in speaking out, debating and asking the right questions, but who can balance that with motivating, learning and, importantly, listening. And with this book, you’ll get to enjoy some juicy stories along the way!’

Penny Wilson, Chief Executive, Getting on Board

‘Debra writes from the head and the heart to deliver a perfect combination of big thinking and practical gems. As well as being full of tips, insights, anecdotes and wisdom, this guide is especially useful in addressing the sometimes fraught relationships, behaviours and culture in charities. Debra reveals the psychology behind it all, which challenged me to take a good look in the mirror.’

John Williams, Vice-Chair of the Association of Chairs and former Charity Commissioner

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Contents

About the author	vii
About the Directory of Social Change	viii
Acknowledgements	ix
Foreword by Tesse Akpeki	xi
Preface	xii
Introduction	xiii
Chapter 1 One of us is crying: the challenges of trusteeship	1
Chapter 2 The name of the game: knowing what you're there for	11
Chapter 3 Take a chance on me: working with your CEO	31
Chapter 4 Super trouper: chairing the board	53
Chapter 5 Knowing me, knowing you: working with fellow trustees	73
Chapter 6 Gimme, gimme, gimme: managing the information	95
Chapter 7 I do, I do, I do: complying with governance guidance	121
Chapter 8 Money, money, money: the essentials of finance	139
Chapter 9 The winner takes it all: the psychology of decision-making	161
Chapter 10 SOS: managing risk and dealing with crisis	171
Chapter 11 Thank you for the music: tips from trustees	185
References and notes	191
Recommended reading	197
Index	199

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.

Acknowledgements

In my over 35 years' experience in the charity sector I have worked with a lot of boards of trustees – people who have inspired and taught me (even those who accidentally showed me what not to do!).

I can't possibly name all of the wonderful people whom I have worked alongside, led or followed during my adventures with trustees. But I can say a huge thank you to all of my amazing DSC trustees over the years and, in particular, the current cohort: Caron Bradshaw, William Butler, Joyce Fraser, Matt Hill, Emily Hughes, Anneka Kapadia, Lizzie Kenyon, Phyllida Perrett, Andrew Purkis, Kashif Shabir and Lesley Thornley. They have really demonstrated brilliant governance during the Covid-19 crisis, because they had already established a solid base of trust and communication on which to build.

My colleagues on the boards of In Kind Direct and the Berkshire Community Foundation who demonstrate such commitment to the cause and dedication to the charities we love.

The brilliant leadership shown by our Chair at Whiteknights Primary School, Mark A'Bear and the visible demonstration of 'leadership as partnership' he shared with the school's Head Teacher, Francois Walker. I miss working with them!

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And some personal mentions of folk who have inspired and guided me in my own trustee journey over the decades and never given up on helping me to be better: Maria Pemberton, wise guide and mentor; Lesley Thornley for making sure I know my facts; Rosie Chapman for her common sense and practical approach to getting it right; Tesse Akpeki for her passion and deep-rooted understanding of what it means to be a good trustee; Catherine Johnstone for tenacity in all things governance (it can be done if you don't give up!); and finally, Andrew Hind whose calm good sense has kept me sane during many tough times.

A very special mention to Margaret Lloyd, former Chair of DSC, who sadly lost her life to cancer and was both a mentor and a friend and whose presence and wise guidance I miss deeply.

And finally to my life partner, Andy Wood, who listens, argues, makes me see the other side of the story and always supports me by making sure I have space and time to be a trustee.



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

Introduction

This is a book for trustees, written by a trustee. This is also a book for human beings, written by a human being. I've been involved in charity governance at one level or another for about 30 years. During that time I've seen some incredible governance and some that, let's be honest, was not of the standard one would hope. Over the years I've come to realise a number of things – firstly, no matter how well you understand the legalities and technicalities of being a trustee, it's the interpersonal relationships that usually cause the most (sometimes serious) problems. Secondly, it can be incredibly easy to forget that there is a human being behind the role 'trustee'. And thirdly, having effective systems and processes in place to support you when the 'people' bit gets difficult can often help you to avoid situations going wrong in the first place, or make it easier to handle them.

So, as you work your way through this book, you will find it is littered with real-life stories and experiences – both my own and ones I have heard from others. These serve as tips that will help you to avoid things going wrong, and practical examples and ideas to help make the role of trustee slightly easier to navigate.

But why else should you read this book? What gives me the right to talk about these issues? Well, I've been a trustee, a chair and a CEO. I've also mentored chairs and CEOs, and I've worked with boards to help them to get their governance right – from charities with turnovers in the multi millions to those with barely a kettle and a cup for resources. I co-founded the Small Charities Coalition, which subsequently merged with the Charity Trustees Networks, and therefore heard a lot about what trustees deal with. And, in fact, I owe a lot to the trustees who belonged to the Small Charities Coalition because they shared many of their stories with me, some of which I share with you in this book.

All of this means I know what it feels like to work alongside fellow trustees, try to lead them and have them lead me. And yes, there are some traumatised chairs and trustees out there who have had me as a colleague on their board. My years of experience and of trying to help others to get it right don't mean I've nailed it either! Just recently a fellow trustee confessed to me that she found me really intimidating and hard to challenge. I'm so glad she had the courage to tell me – I wouldn't have realised if she hadn't and I now know that this is something I need to work on.

Like most of you I want to be a good trustee. There have been times when I have achieved that and – I have to be honest – times when I really haven't. I remember an incident with a fellow trustee over the right way to word a policy on inclusivity in recruitment, which resulted in me behaving like a total cockwomble and not properly listening to their fears because I was so sure I was right. In the end, it turned out I was! But my reaction did not enhance my argument.

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.

Index

- 360-degree feedback 41–2
- academic qualifications 38, 135
- accountability 18, 54, 122, 125, 129, 137–8
- accounting rules (SORP) 142–3, 148–9, 196
- accounts 144–7, 158
- Ace and Dash, fictional trustees *see* dos and don'ts
- ACEVO (Association of Chief Executives of Voluntary Organisations) 31–2, 47
- action points 67, 68, 105–6
- adverts, for trustees 135, 136
- advice from trustees 185–90
- agendas 63–4, 101–4
- Akpeki, Tesse xi
- alignment 26, 66, 86
- analysis 164, 166–7
- AOB (any other business) 102
- appeals, in grievance procedures 50
- applications, blind 135
- appointment, of chair 53–4
- appraisals 40–6, 47, 58–60
- assets 151–2
- Association of Chairs 71
- Association of Chief Executives of Voluntary Organisations (ACEVO) 31–2, 47
- atmosphere, meetings 65, 88–9, 99
- attitudes 1–4, 84
- audits 105, 141
- availability, heuristic 168

- backgrounds, of trustees 20–1, 124, 133, 134–5, 136
- balance sheets 148–54
- Barfield, Alexander 185
- behaviours, of trustees 1–4, 75–80

- benefits of trusteeship 7–9
- bias xi, 38–9, 134–5, 164, 167, 169–70, 195
- Blackadder the Third 73, 193
- blind applications 135
- board meetings 62–70
 - agendas 63–4, 101–4
 - meeting environment 65, 88–9, 99
 - minutes 65, 68, 87, 105–6
 - paperwork 98–9
 - virtual meetings 65–6, 96, 99–100
- body language 65, 87–8
- Bradshaw, Caron 185
- budgets 18, 143–4
- bullying 49–50
- business-as-usual reports 109–10

- capital, endowment funds 151
- caring and childcare 134, 195
- Carlyle, Thomas 1, 191
- cash-flow forecasts 147–8
- CEOs (chief executive officers) 17, 19
 - analogy of nannies and parents 34–5
 - board meetings 63–4
 - disciplinary procedures 47–9
 - grievances against 49–52
 - induction 39–40
 - performance, poor 47–52
 - performance, reviewing 40–6, 47
 - recruitment of 37–40, 192
 - relationship with chair 60–2, 67–8
 - role and relationship with board of trustees 31–7, 46, 52
 - trust 31, 35
 - voting rights 33

- chair of trustees xvi–xvii, 45, 71
 - Association of Chairs 71
 - board meetings 62–8
 - monitoring board
 - performance 68–70
 - role 53–6
 - working with the CEO 60–2
 - working with trustees 56–60
- challenges of trusteeship xiv–xv, 1–9
- change 37–8, 51–2
- character 83–4
- The Charge of the Light Brigade* 14
- charitable objects 11, 12–13, 20
- charity accounting rules, SORP 143, 148–9, 196
- Charity Commission for England and Wales 7–8, 11, 111, 121–2, 123, 138 *see also* Scottish Charity Regulator
- Charity Commission for Northern Ireland 11, 122, 123
- Charity Finance Group 141
- Charity Governance Code 55, 58, 121, 123–38, 194
 - self-evaluation test 125–9
- charity law 33, 121, 192
- charity regulators 11, 20, 51, 111, 125
- Charity Reporting and Accounting: The essentials* 141, 142–3, 196
- charity sector 20–1
- chief executive officers (CEOs) *see* CEOs
- childcare 134, 195
- CLIC Sargent 137, 195
- cognitive capacity 163
- communication 6, 57–8, 86–91
- complaints 2–5, 49–52
- compromise 25–7
- confidentiality 51, 54–5
- conflict, between trustees 73–4
- constructive dismissal 47
- control 124, 127, 131
- Covid-19 xii, 66, 99, 117, 173, 175
- creditors 153
- crises xi, xii, 117, 176–9, 181–3
 - board performance under pressure questionnaire 179–80
- dashboard, key indicators report 113
- debriefing 68
- debtors 152
- decision-making 124, 127, 130–1, 161–2
 - mental shortcuts/
 - heuristics 167–70
 - psychology of xi, 163–7
 - when the board makes the decision 162–3
- digital communication 57–8, 101 *see also* virtual meetings
- direction, strategic 19
- Directory of Social Change (DSC) xvi, 22, 42–6, 58, 65
- disciplinary procedures 47–9
- discrimination xii, 38–9, 133–7
- disliking/liking 82, 83, 89
- dismissal 47, 48
- diversity 20, 125, 128, 133–7
- documents, governing 11, 12, 30
- Dodson, Chris 186
- donations 137, 156
- dos and don'ts xi, xvii
 - chairing the board 71
 - challenges of trusteeship 9
 - complying with governance guidance 138
 - decision making 170
 - finance 159
 - managing information 118–19
 - managing risk and crises 182–3
 - role of trusteeship 30
 - working with fellow trustees 93–4
 - working with the CEO 52
- DSC (Directory of Social Change) xvi, 22, 42–6, 58, 65
- Dunning, David 132
- Dunning–Kruger effect 132, 194

- Es of listening, six 87–9
- economic psychology 75, 163
- education, level of 38, 134, 135
- effectiveness, of board 124, 128, 132
- Einstein, Albert 95, 193
- emails 101, 132
- emotions 88
- endowment funds 151
- environment, for meetings 65, 88–9, 99
- equality 133–7
- The Essential Trustee: What you need to know, what you need to do* 7–8, 123, 191, 193, 194
- ethnic minorities, representation on boards 133–7, 194
- executive team 7, 45, 69, 114
 - comments about trustees 2–3
 - decision-making 162
 - role 19–20
- expectations 88
- expenditure 157
- experience, of trustees 20–1, 88
- expertise, of CEOs 33–4, 61
- expressions 65, 87–8

- facial expressions 65, 87–8
- familiarity 169
- fear 165
- feedback 1–6, 41–2, 53–4, 82
- feelings 84
- finances 16, 19, 110–11, 139–42, 158–9
 - accounting rules 142–3, 148–9, 196
 - balance sheets 148–54
 - budgets 18, 143–4
 - cash-flow forecasts 147–8
 - management accounts 144–7
 - presentation of accounts 158
 - reports 106, 110–12
 - statement of financial activities (SoFA) 154–7
- Floyd, George xii
- following up 68

- Ford, Henry 139, 195
- forecasts, financial 111, 147–8
- framing 169
- funding 14–15, 20, 22
- funds 143, 148–50, 154

- gorilla experiment 166, 196
- governance 19–20
- governing documents 11, 12, 30
- graphs 106, 109, 114, 158
- grievances 49–52

- Hall, John Foster 11, 191–2
- Hampton–Alexander Review 136, 195
- harassment 49–50
- hats, perspective 13–14, 19–20
- hearing 87
- heuristics 167–70
- hijackers, in meetings 67
- Hoffa, Jimmy 53, 192
- honesty 122, 130
- Hughes, Emily 186–7
- human onion 83–6, 193
- humility 6–7

- in-groups 58, 193
- inclusivity 65, 128, 133–7
- income 156–7
- induction, of CEOs 39
- information 117–19, 131–2
 - agendas 63–4, 101–4
 - for board meetings 98–9
 - in a crisis 117
 - minutes 65, 68, 87, 105–6
 - paperwork needed by trustees 95–8
 - reports 18, 106–14, 117–18
 - sub-committees 114–16
 - withholding 54–5
- inspiration, vision 24
- instant reaction system 164–70
- integrity 122, 124, 127, 130
- interviews 136
- intuition 166, 170

- invisible gorilla experiment 166, 196
- irrationality 165
- Kahneman, Daniel 75, 163–4, 193, 196
- Kalen-Sukra, Diane 121, 193
- Kennedy, John F. 27, 192
- key indicators dashboard report 113
- knowing each other 80–1
- Kruger, Justin 132
- language
 - in adverts for trustees 135, 195
 - visions, simple wording 21–7
- law, charity 33, 121, 192
- lead trustees 116, 117
- leadership 122, 124, 126, 130
- Lee, Kate 137
- legal obligations xvi, 17, 19
- liabilities 153, 154
- liking/disliking 82, 83, 89
- listening 86–91
- logical behaviour 74–5
- loss aversion 168
- management accounts 144–7
- management indicators 109–10
- management of staff 18 *see also*
 - CEOs
- mediation, in disciplinary procedures 49
- meetings *see* board meetings; one-to-ones
- mental shortcuts, heuristics 167–70
- merit 136–7
- messenger 169
- minutes 65, 68, 87, 105–6
- mission 21, 27–30
- mixed-revenue models 15
- money 14–15, 20, 22
- Moody, Tom 187
- Moses visions 24–7
- nannies and parents analogy 34–5
- narrative reporting 106–8
- needs 81–2
- Nehru, Jawaharlal 171, 196
- networking 65
- Nolan Principles 121, 122–3
- objectives 11
- objectivity 7, 122
- objects, charitable 11, 12–13, 20
- obligations 19
- one-to-ones
 - with CEOs 36, 40, 47
 - chair with CEO 61–2
 - chair with trustees 57–8
- openness 122, 125, 129, 137–8
- operational thinking 13
- Oram, David 187–8
- organisational purpose 124, 126, 129–30
- out-groups 58, 193
- outcomes, chair 56
- paperwork *see* information
- Parker Review 136, 195
- patriarchy 133, 135
- patterns 164, 165
- performance of CEOs, poor 47–52
- performance reviews 40–6, 47, 58–60
- Perrett, Phyllida 188–9
- perspective 7, 13–14, 19–20, 69, 86, 118
- place cards 65
- plans 33, 97, 106, 144, 181–2, 196
 - see also* strategic objectives
- The Pleasure and the Pain: The no-fibbing guide to working with people* 81
- policies and procedures 16
- power 7, 31, 49, 57, 58
- preconceptions 164–5
- preparation, for board meetings 63–4
- presentations, PowerPoint 113
- pressure, crises xi, xii, 117, 176–9, 181–3

- pressure, crises—*continued*
 board performance under
 pressure questionnaire 179–80
- primacy 169
- priming 167–8
- privilege 135
- profit and loss account 154–7
- progress, against strategic objectives 29
- proposals for the board 113–14
- prospect theory 163
- psychology 75, 81–6
 of decision-making xi, 163–7
- public benefit 11, 33, 53, 121, 123, 192
- public office 122
- Purkis, Andrew 189
- purpose, of trusteeship 11–20
- purposes, charitable 11, 12–13, 20
- qualifications, academic 38, 135
- quarterly reports 106–8
- questioning 14, 20
- questionnaires
 board group work 92–3
 board performance under pressure 179–80
 board self-assessment 69–70
- recency 169
- recruitment
 of CEOs 37–40, 192
 of chair 53–4
- refreshments 65, 88
- regulators, charity 11, 20, 51, 111, 125
- regulatory obligations 19
- relationships xiii–xvi, 6–7
 within the board 73–81
 CEO and board of trustees 31–7, 39–40, 46, 52
 CEO and chair 60–2
 chair and board of trustees 56–60
- reports 18, 106, 117–18
- reports—*continued*
 business-as-usual 109–10
 dashboard, key indicators 113
 financial 106, 110–12
 proposals 113–14
 quarterly 106–8
- reserves, funds 143, 148–50, 154
- restricted funds 143, 148, 150
- reevaluation reserve 154
- Richards, Keith 31, 192
- risk xi, 19, 124, 127, 131, 171–6, 181–3
- role description, chair 55
- roles
 CEO 31–7
 chair of trustees 53–6
 executive team, compared with trustees 19–20
 trustees 11–20
- Rubin, Andy 189–90
- rules of thumb, heuristics 167–70
- safety 165–6
- Saint-Exupéry, Antoine de 23, 192
- salaries 137–8, 195
- Scottish Charity Regulator 11, 121–2, 123
- scrutiny 20
- seating plans 65
- self 83–4
- self-assessment, board 68–70
- self-awareness xi, 1–2, 4
- self-evaluation test, Charity Governance Code 125–9
- selflessness 122
- Seven Principles of Public Life 121, 122–3, 194
- Shaw, George Bernard 9, 191
- similarity 169
- six Es of listening 87–9
- Small Charities Coalition xiii, xiv, 57
- socioeconomic background 134
- SoFA (statement of financial activities) 154–7

- SORP (statement of recommended practice) 143, 148–9, 196
- staff 2–3, 6–7, 18, 28–9, 49–52 *see also* CEOs; executive team
- standards, for charities 121–3
- statement of financial activities (SoFA) 154–7
- statement of recommended practice (SORP) 143, 148–9, 196
- stock 152
- straplines 21
- strategic direction 19
- strategic objectives 21, 27–30, 106, 108
- strategic thinking 13, 14, 32
- sub-committees 114–16
- System 1 – sprinter 164–70
- System 2 – analyst 164, 166–7

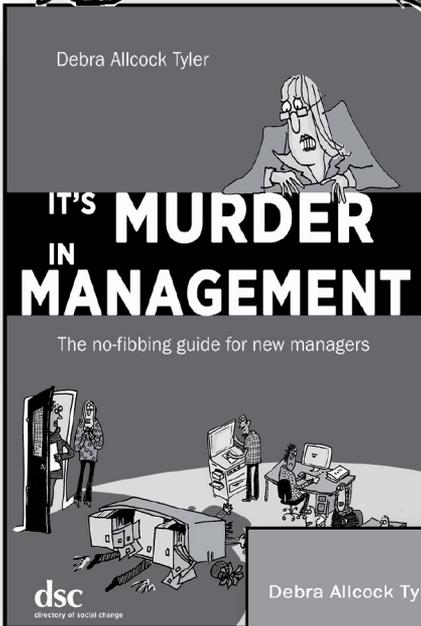
- targets 46, 136–7
- Taylor, Sean 190
- teams 80–1, 91–4 *see also* executive team
- Tennyson, Alfred 14, 192
- Thaler, Richard H. 75, 163–4
- thinking 164
- Thinking, Fast and Slow* 75, 163, 193, 196
- 360-degree feedback 41–2
- Tideman, Teresa 190
- time keeping, in meetings 66
- tone 87, 89
- It's Tough at the Top: The no-fibbing guide to leadership* 75, 193
- training, of trustees xv
- transparency 20, 129, 137, 138
- trust 31, 35, 62
- Tversky, Amos 75, 163–4

- unfair dismissal 47
- unrestricted funds 143, 148, 150

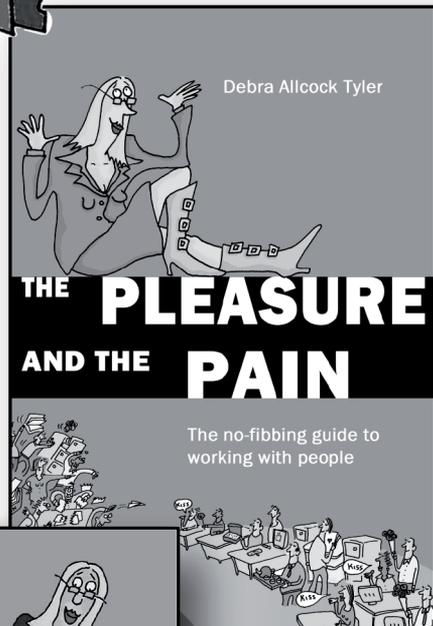
- values 84, 85
- virtual meetings 65–6, 96, 99–100, 193 *see also* digital communication
- visions 21–7, 30
- visual representations 106, 109, 114, 158
- voting, board meetings 66, 86
- voting rights, CEOs 33

- whistle-blowing 51
- withholding information 54–5
- women, representation on boards 133–4, 136–7, 194
- wording, of visions 21–7
- work in progress 152
- working groups 116–17
- working relationships
 - board group work
 - questionnaire 92–3
 - with CEOs 31–7, 39–40, 46, 52
 - with chair 56–60
 - with fellow trustees 2, 4–6, 73–81, 91–4

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