



# A DUMMY'S GUIDE TO TRICKY TRUSTEES

AN EXCERPT FROM THE BOOK

## WHO CARES?

BUILDING AUDIENCE-CENTRED ENGAGEMENT  
STRATEGIES IN THE NON-PROFIT SECTOR

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Having been through the development process, it's likely by now that the case for investing in your strategy seems self-evident to you. External engagement is fundamental to how your organisation effects change and is therefore a shoo-in for strategic investment, right?

Well, sure, I agree with you, but for others it may not be immediately obvious. For some of your directors and board trustees, any investment that's not on front-line services can feel uncomfortable. Others may see the importance of your work – at least up to a point – but see no case for investment because, well, Twitter is free isn't it?

So, you're probably going to have to make your case to the board. It's an experience that can feel a bit like having your teeth pulled out. Let's try to make this a bit fun, then.

### KNOW YOUR BOARD

In a book on audience-centred strategy it seems fitting that we should think about your board as an audience in its own right. You will need to learn as much about your trustees as possible, because – I don't think I can overstate this – probably the biggest single factor in whether you succeed in winning new investment will be how well you've understood them. And just like any other audience, your board will be motivated by a range of different things.

To get you thinking, here's a dummy's guide to tricky trustees. Admit it – you have at least one or two of these in your charity, right?

THINK ABOUT YOUR BOARD AS  
AN AUDIENCE IN ITS OWN RIGHT



### THE SILVER BULLET ONE

Always looking for the single simple answer to any issue facing the charity. Sentences often prefixed with

*'We just need ...'*, as in, *'We just need to hire some young people who know about Twitterbook,'* as they skim-read your strategy wondering why you're making everything so complicated.



### THE ONE WHO THINKS THEY'RE THE MESSAGE

A close relative of the silver bullet one, who believes you 'just need' to tell everyone that your charity is the best at what it does. As soon as the world realises this, untold money, attention, and status will follow. Simple.



### THE ONE WHO THINKS THEY'RE THE AUDIENCE

The survey sample of one who thinks you're not doing anything. They've not seen any mentions of your charity in their favourite newspaper or your billboards on their commute home or had your direct mail drop through their letterbox. If they haven't, then nobody has.



### THE PURITANICAL ONE

Insists that all resources should be spent on services and programmes. They're fearful or dismissive of investing in anything that might be seen as an overhead – and without some very careful positioning, that might include your strategy.



### THE WILDLY UNREALISTIC ONE

Clueless about what things cost, and however great your ambition, it won't match theirs. *'Why don't you ask Ed Sheeran to front our Christmas appeal?'*

*I'm sure ITV would donate some primetime ad space to run it,'* they might say. *'We can at least ask,'* you reply.



### THE TACTICAL PR ONE

Recruited to the board on the strength of their background in old-school PR. For them, it's all about coverage – counting column inches and social media mentions. Talk about audience targeting or strategic objectives, and they'll take on the perplexed expression of a malfunctioning android.



### THE COMMERCIAL ONE

The hyper-confident 'bizsplainer' (see page 291) who imposes modes of thinking from the giant consumer brand they work for, where marketing spend is justified only by the sales it produces. The slow, messy business of social change may irritate them. They'll support investment but will want an immediate return.



### THE ONE WHO KNOWS THE ANSWER

Had an idea about what you should be doing shortly after they became a trustee and have been riding their hobby horse ever since. Your session at the board is just another opportunity for them to tell you the 'answer' again. It's probably a benefit gig or something.



### THE INSCRUTABLE ONE

I mean ... who knows? This deadpan trustee might love your strategy or hate it. Either way, they're not letting on. Every proposal, protocol, or budget evokes the same level of emotion: precisely none. Their job is to control risks and resources, and you're one of them.



### THE NAME-DROPPING ONE

Every conversation is an opportunity to mention the celebrity/business leader/government minister who lives in their village in Oxfordshire/Berkshire/Hampshire and to urge you to *'ask them to do something'*. *'Worth a try ...'*, you want to say, *'... but would you mind also reading the \*\*\*\*ing strategy?'*

ONLY  
**15%**  
OF TRUSTEES

**BELIEVE THEIR CHARITY HAS SUFFICIENT MARKETING SKILLS AT BOARD LEVEL TO MEET THEIR ORGANISATION'S NEEDS**

*Taken on Trust. Report from the Charity Commission, 2017.*

**48%**  
FEWER THAN  
HALF OF CHARITY  
COMMUNICATORS

**AGREE THAT 'EXTERNAL ENGAGEMENT IS SEEN AS A LEADING STRATEGIC FUNCTION IN MY ORGANISATION'**

OK, OK ... they're not all that bad. But there is a serious point here. That is to say, the people who will be making the investment decisions you rely on will probably bring their own pre-existing assumptions, misconceptions, and prejudices to the meeting. So far, so normal. The particular difficulty with boards, however, is that because of their position of authority, they tend to come to a subject with a starting assumption that they are right.

So, while evidencing your strategy is important, making a strictly rational investment case probably won't cut it on its own. You will also need to find a way to engage the more 'difficult' trustees on their own terms by anticipating some of the challenges they might make and having a ready answer.

Now, because your trustees are 'institutionally right', you probably won't get far trying to prove them wrong. Instead, show how their ideas are the very foundation on which you built yours. You should be able to shoehorn them in somewhere.

## ■■ BECAUSE YOUR TRUSTEES ARE 'INSTITUTIONALLY RIGHT', YOU PROBABLY WON'T GET FAR TRYING TO PROVE THEM WRONG

## ■■ SOMEWHERE AMONG YOUR TRUSTEES YOU'LL NEED TO FIND ALLIES

In the interests of balance, I should acknowledge that aside from the archetypes I just mentioned, *other trustees are available*. If you do have the good fortune of having one of these lesser-spotted species on your board, grab them, hold tight, and don't let go ...

- The one who relentlessly reminds the board to stay true to its values
- The one who challenges the board to take calculated risks and think long term
- The one who actually does know some really useful people
- The one who understands your discipline and will contribute ideas without imposing them on you
- The one who's got your back, so you don't mind when they tell you you've screwed up
- The one who trusts you by default, and allows you the space to do great things

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**Joe Barrell's new book 'Who Cares?', is a comprehensive guide to developing audience centred engagement strategy, and concludes with vital tips on how to win investment from your board.**