

Best Practice Guide  
**How to talk to your  
trustees about comms**

**by Kay Parris**



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*Comms should be able to say to their trustees: ‘Here’s how the external environment is changing; we need to keep you in the loop about this.’ All of them need to know: this is how we are affected and this is how comms is going to help us ensure we are meeting our obligations.”*

**Gail Scott-Spicer, CEO, Carers Trust**



# Welcome

“Charities really only have one asset: your reputation. It is trustees’ responsibility to look after it.”

So said Bernard Jenkin MP, chair of the Public Administration and Constitutional Affairs Committee (PACAC), at a gathering earlier this year of charity leaders discussing research into what the public, MPs and opinion formers think of charities.

To communicators in the room, it was proof positive of the need for trustees and senior management to embrace communications as a strategic, top-level function. Reputation is a core comms area: if trustees are ultimately responsible for this prime asset, they surely need comms with them as allies at the board table.

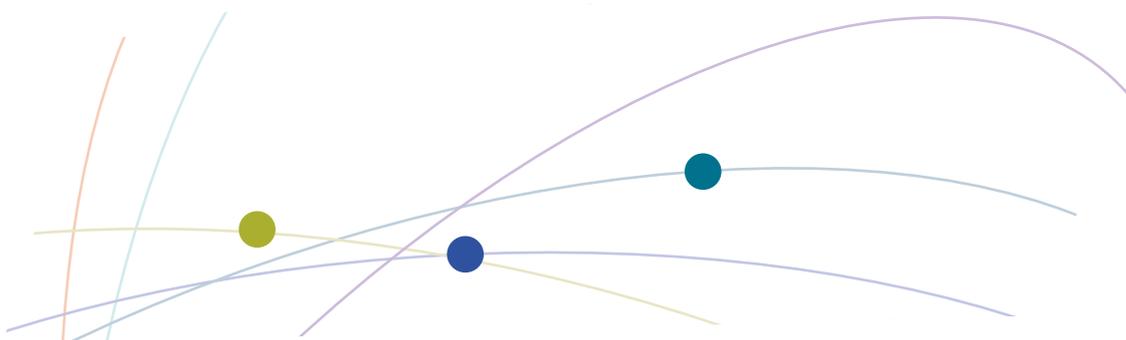
Despite a torrid year of reputation-bashing headlines for the sector, there is a long way to go before this becomes a truth universally acknowledged. But there is a great deal that comms professionals can do to reinforce their position.

This best practice guide aims to help comms people take steps to strengthen their board-level relationships and influence. It makes the case that most parts of the trustee remit can benefit from engagement with comms.

Bernard Jenkin made his comment at a critical moment for the charity sector. He was speaking in the wake of PACAC’s inquiry into charity fundraising and governance practices following a series of scandals. The committee backed a raft of proposals for tighter self-regulation put forward by Sir Stuart Etherington, chief executive of NCVO, but asserted: “No system of regulation can substitute for effective governance by trustees.”

By demonstrating value and solving problems for the organisation, communications has a new opportunity to win recognition and make a difference. We hope this guide will show you how.

**Vicky Browning, director, CharityComms**



# Part 1. The new context

Governance failings, real and perceived, have been at the centre of a year of adverse media stories about charities. Alleged failings have included:

- Unethical fundraising tactics or failure to prevent such tactics being used by third party bodies on the charity's behalf
- Lack of transparency in reporting between trustees and executive arms of the charity
- Poor governance of funds
- Inappropriate relationships or arrangements with commercial bodies
- Poor strategic management – for example, in managing growth or preventing over-diversification.

Problems like these raise questions over the performance of trustees as the ultimate chiefs of the charities concerned. Such failings conflict starkly with the Charity Commission's expectations of how trustees should run their organisations. These expectations include the following:

- 1 Ensure your charity is carrying out its purposes for the public benefit.
- 2 Comply with your charity's governing document and the law.
- 3 Act in your charity's best interests.
- 4 Ensure your charity is accountable.
- 5 Manage your charity's resources responsibly.
- 6 Act with reasonable care and skill.

*From The Essential Trustee: what you need to know, what you need to do, published by the Charity Commission, last updated July 2015*

## Link comms with good governance

In the current climate, trustees are keen to help repair the sector's damaged reputation. Among other measures, many are gearing up to respond positively to new fundraising guidelines and the new *Charities (Protection and Social Investment) Act 2016*, which aim to raise governance standards (see also Part 7).

Effective communication will be crucial in helping trustees to meet these new challenges. Many trustee duties relate closely to core comms responsibilities around, for example, impact-reporting, awareness-raising, accuracy of information, reputation-management and

transparency. The Charity Commission breaks down its requirements for good governance into detailed expectations (see panel), a number of which could clearly benefit from comms support.

The Charity Commission expects trustees to:

- Ensure you understand the charity's purposes as set out in its governing document...
- Be able to explain how all of the charity's activities are intended to further or support its purposes
- Understand how the charity benefits the public by carrying out its purposes...
- With your co-trustees, make balanced and adequately informed decisions, thinking about the long term as well as the short term...
- Make sure the charity's assets are only used to support or carry out its purpose
- Avoid exposing the charity's assets, beneficiaries or reputation to undue risk...
- Use reasonable care and skill, making use of your skills and experience and taking appropriate advice when necessary...
- Be able to demonstrate that your charity is complying with the law, well run and effective.

*Extracts from The Essential Trustee: what you need to know, what you need to do*

A recent Charity Commission report on *Public trust and confidence in charities* reminds us that: "Familiarity ... [is] important when the public choose which charities to trust. Three-quarters of the public agree that they trust charities more if they have heard of them." The proviso, of course, is that charities need to ensure people get to hear about them for the right reasons and in the right way.

"Our trustees want us to make a step change as an organisation, maximise our potential, follow good practice and understand how to measure and communicate the impact we make," says Richard Hawkes, CEO of British Asian Trust. "They also want to make sure we have our own house in order, just in case we ever need to explain or justify what we do."

## Maintain perspective

The present context raises the need and potential for communicators to help raise standards by working more closely with trustees. At the same time, it's important to keep things in perspective. While every charity can learn from the challenges the sector has faced in the last year, most can be proud of the service they provide and will not need to make fundamental changes.



For comms people this is an opportunity. I have been hearing from trustees that they were not really conscious of the level of responsibility they had, nor were they always being supported in ways that they now realise they should have been supported.

**John Grounds, communications consultant and CharityComms chair**

There isn't a board meeting at the moment where someone doesn't say Kids Company. There is a level of anger about a few bad apples casting a huge shadow – no sector is perfect. I think trustees taking their responsibilities a bit more seriously as a result can only be a good thing, but I worry that in this country we tend to have a kneejerk response. You end up with legislation coming out of your ears and then you won't get trustee support.

**Carole Easton, CEO Young Women's Trust, chair Young Minds**

Our analysis is that the focus or responsibility being placed on chairs and trustees is disproportionate. They are not professionally commissioned to do this work – directors are.

**Jack Lundie, director of communications, Oxfam GB**

## Improve organisation-wide transparency and quality control

When comms has proper influence in an organisation, it can help to improve the quality of information put out by other departments and disciplines. In particular, it can ensure transparency happens across the organisation – something that could be crucial in improving governance standards.



The question may not only be, does comms have a seat, but is it sufficiently integrated, at the board and at senior management level, within the organisation? Does the comms person feel they have sufficient authority to question what is going on in other sections of the charity? Maybe the board's responsibility, for example, is to ask comms to look at the accounts before they get published. I have had occasion in the past to ask Finance to put another heading in, or an explanation, so we don't have people drawing false conclusions which could in turn lead to reputational damage.

**Carole Easton, CEO Young Women's Trust, chair, Young Minds**

Make sure expertise is on the board, so you are getting the right questions asked about things that perhaps were not being asked, for example, about fundraising risk. I also think there is a role for comms in a wider sense, making sure that all communications protect and enhance the charity's reputation.

**John Williams, communications strategist and vice chair of the Association of Chairs**

## Foster a culture of mutual trust

Good, respectful relationships foster good communications and vice versa, something that cannot help but improve the prospects for openness, accountability and straightforward dealings in an organisation. These things don't happen by themselves, but reward conscious effort.

"Our trustees and our communications team know and trust one another, and we have worked quite hard at getting a good relationship between the staff and the volunteers too," says Jenni McCartney, chair of Samaritans. "Whoever you are, it is about making sure people trust one another enough that they feel they can be honest and direct about their level of understanding."

## Part 2. Get to know your trustees

Trustees are not generally interested in communications for its own sake, but tell them how it raises brand awareness or mitigates risk and they will sit up and listen.

If communicators want to improve the influence of comms at the top of the charity, we need to understand where our trustees are coming from and prepare to help tackle their concerns.

### Learn the language

Quite naturally, communicators tend to think their discipline is king, and might be inclined to view any contact with the board as a chance to promote new projects and successes. Let's not forget, however, that our trustees' expertise and passions probably lie in other spheres of life and, when it comes to the charity, their prime interest is in governance. We should learn to speak their language.

Gail Scott-Spicer is CEO of Carers Trust, vice chair of CharityComms and also a trustee of Money Advice Trust. She says: "What I've realised, having moved from being a comms director to a CEO and a trustee of a couple of charities, is that you are suddenly in a different world.

"While you never lose your comms and marketing background, I now think differently. Board members might have a passing interest in comms, but they might not. What they are interested in are the outcomes of the charity, the risks associated with it. They are interested in reputation from the perspective of risk management and the effect on the business. They are interested in the financials. I believe it's this lens that comms people need to present through to get a board's attention and commitment."

### Solve board problems

An organisation's priorities, and the role of comms within them, will be clear to a comms director who has strong board-level relationships. Where channels of engagement are less well-established, the challenge is to pin down board concerns, demonstrate how communications can progress organisational goals, and find comms solutions to applicable problems.

High-level problem-solving and the strategic role of comms are more fully explored elsewhere in this guide. However, it's not all about strategic-level assistance. There may be simple things you can

do to help make a trustee's life easier. For example, in a small charity with no formal comms function, a few practical measures could help ensure everyone is aware of core values and charity outcomes.

Marketing executive Chris Lee, trustee of the Men's Sheds Association, has worked in the charity sector for over 35 years. "One thing that always surprises me is when I overhear trustees describing their organisation – and it is not the organisation I am working for!" he says. "I think it's about giving trustees the tools to be effective and consistent in matters of corporate communication.

"A great way to do this is to give each trustee a few postcard-size profiles of how the charity or social enterprise has benefited particular individuals – these could be real life cases or an amalgam of two or three.

"When next someone says, 'Oh, you're a trustee of XYZ, what do they do?' trustees can come out with a consistent and useful response – it's also personal and powerful."

### Tap into knowledge

Your board of trustees may be an unexploited resource, harbouring all kinds of technical expertise that could help comms – with information, contacts, guidance or fact-checking, for example. The difficulty may be finding opportunities to learn what individual trustees bring to the table; wariness of board over-involvement can also get in the way. Yet obstacles can be overcome through fostering a climate of mutual respect.



On the whole I want to have the charity's paid professionals speaking to the media or at conferences. But there are exceptions to that. For example, we have a trustee on our board who was our principal spokesperson when the Assisted Dying Bill was going through Parliament as a private member's bill. That's because she has a high level of policy knowledge and understanding on the issue. But our communications team was still involved, because we would agree the approach – we had a strategy around how and what she was going to say.

**Mark Atkinson, CEO, Scope**



Professor John Schofield is one of the UK's leading consultant pathologists and is on our board. If a story comes in asking for press quotes on an issue relating to his area of expertise, such as around Lynch syndrome testing or bowel cancer screening, we get in touch with him. We want our comms to be evidence-based. The comms team role is to make sure those messages are put out in the right way for the media concerned.

**Deborah Alsina, CEO, Bowel Cancer UK**

### Discover skills and talents

Large charities often employ strong, multi-faceted comms teams and adhere to the principle that trustees govern while executives do the work. However, many charities – particularly smaller ones – recruit trustees who are prepared to roll up their sleeves.

Peter Jenkins is managing director of external affairs at Leonard Cheshire and also a trustee at Cambridge House. In his trustee role, the chief executive will call on him as needed.

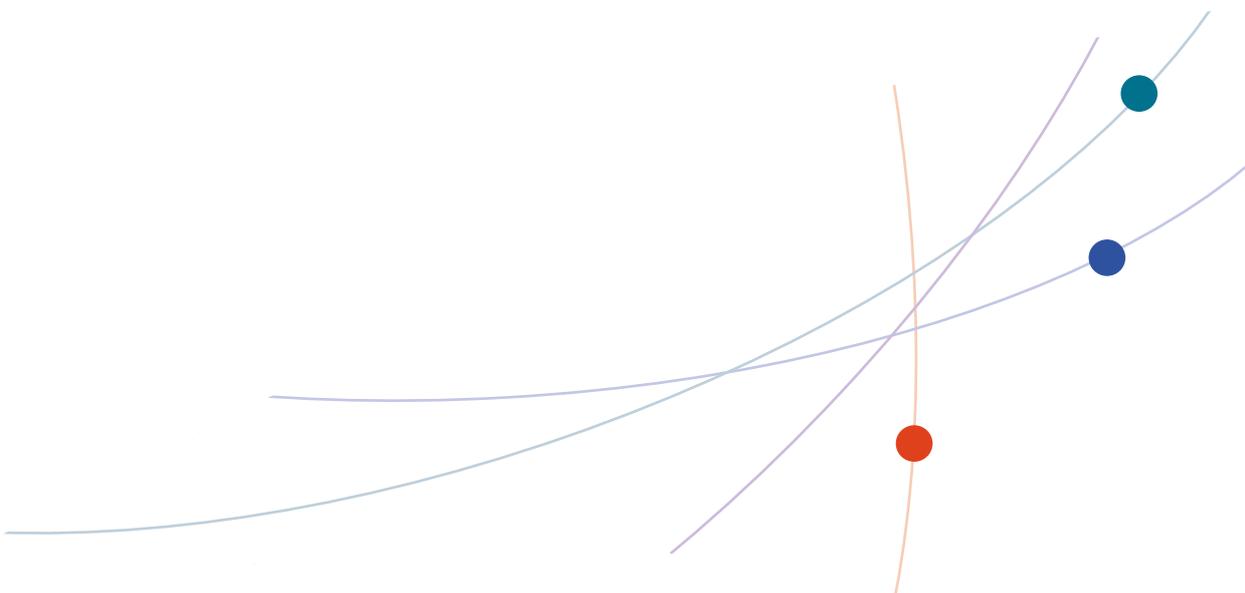
“For example, when the crisis hit Kids Company, Cambridge House was involved as a similar charity. I acted as a media advisor and did interviews on Channel 4 news and Sky News. I was playing a role for them, a bit like what I do in my day job, but it was all informal.”

Even major charities will call on trustees to fulfil executive functions if the situation demands and the structures fit. Samaritans is a large national organisation, revolving around the work of over 20,000 volunteers. Synergy between staff and volunteers, executive and governance is essential.

In a situation where volunteers serve the charity for years and even decades, often taking up unpaid leadership positions, there has to be full respect and understanding of who the experts are. Samaritans chair Jenni McCartney's broadcast interviews, blogs and other writings have become a major asset for the charity. But she explains, this is a principle that had to be learned.

“People on the board and volunteers have experience outside the charity: they have paid jobs, professions,” says Jenni. “There was a time about 20 years ago when volunteers did not speak on behalf of the charity but that has changed now. I worked in the IT industry for years and was constantly communicating with very senior people in government, and I was an experienced Samaritans volunteer with senior leadership responsibilities in the charity. I felt I could make a contribution, and, along with many other volunteers, I now do so regularly.”

“I have been involved in dealing with the media for just over a year, since I became chair. I have always felt well-supported, I work with professionals who brief me well and people are comfortable about the communications I do. That makes me feel more confident about it, a lot more confident than I did in the beginning.”



## Part 3. Improve access, overcome obstacles

Communications sits at the heart of many successful charities: the board includes a comms champion – and sometimes this person ends up as chair. The senior comms executive is a regular face around the board table and may be seen, after the CEO, as 'first among equals' on the senior management team. Indeed a significant number of communications directors end up as CEOs themselves and ensure that a sound comms function continues to underpin the running of the organisation.

In other organisations, however, the story is very different.

### Acknowledge the problem

During research for this guide, an experienced comms consultant said: "I don't recall ever presenting to a trustees board meeting that had a director of comms on it, and the boards we come across rarely have comms experts among the trustees."

Several comms people reported struggles to gain access to trustee meetings. One remembered answering a rare invitation to the board, only to be offered a seat "to the side of the main table" and an opportunity to speak only when spoken to.

On the other hand, it seems comms people sometimes decline invitations to attend board meetings, or they minimise the opportunity by attending with the sole aim of defending their patch.

Several charities flagged up the widely acknowledged tension between executive and board remits. One trustee with comms expertise described this as "one of the great battles of the sector."

If you are dissatisfied with the status communications has at the top of your organisation, the first step towards change is to understand where the problem lies. Then you can seek to address it.

### Identify the comms champion

If there is no champion among your trustees, the case can be made to the chief executive for a comms expert to be recruited to the board. Otherwise, a comms-friendly trustee, with or without

a relevant background, should be identified from among the existing board.

Where neither option is viable and no one on the board has any kind of comms brief, the CEO and communications lead will need to work hard to ensure trustees understand, support and engage with comms at a strategic level (see page 11).



I don't think they'd had a comms champion before, but they decided they wanted a trustee who could really help challenge, and hopefully add value to, their comms and fundraising work.

**Mark Atkinson, trustee and comms champion at Prisoners Abroad, CEO and former communications director at Scope**

Our comms champion has an extensive background in health communications. He is able to challenge our thinking, whether that's about a brief to a website agency, or saying, "Are you doing enough on this issue?" It's a vital role that I really value.

**Deborah Alsina, CEO, Bowel Cancer UK**

### Get to board meetings

Trustees meet as a non-executive group, as well as with the chief executive, the whole senior management team, or individual department heads or staff. Often the CEO plays a bridging role, facilitating and being copied into any communications between staff and trustees.

One or more comms executives might attend board meetings in person, or may be represented by the chief executive, who conveys their input into a meeting and then feeds back on outcomes.

To ensure a sufficient degree of status for the communications role, a comms lead should expect to attend regular meetings in person. Beyond this, they should be liaising closely with their chief executive and champion trustee.



Some feel the relationship between the chair and the CEO is sacrosanct and that is where everything should happen. My own view is that the chair should have a relationship with all senior directors.

**John Grounds, communications consultant and CharityComms chair**

The director of fundraising and communications attends all board meetings, has a direct relationship with a number of trustees and can contact them directly to seek advice, engage etc. I don't want contact with trustees to only be through the CEO, we're stronger overall if those other relationships are stronger... and it saves time!

**Richard Hawkes, CEO, British Asian Trust**

Our head of marketing and comms attends the board at least once a year, but probably more than that. She also has that link with the board through our champion of communications among the trustees. Her line manager, the external affairs director, is there at every meeting.

**Deborah Alsina, CEO, Bowel Cancer UK**

As well as participating in board meetings, comms people can nurture individual relationships with their comms champion or other trustees. Sub-committees offer one useful channel for this. If your charity has no comms-related sub-committee and you think it could be helpful, raise the idea with your CEO.

Catherine Briddick, chair of Asylum Aid says: "As a small charity, we have a close relationship with our comms person. We meet her once a year at board level, but she also attends our policy and comms sub-committee, which trustees sit on, and which meets more regularly. There is a channel of communication between her and the board."

**Make the most of meetings**

If you are regularly invited to board meetings, maximise the opportunity. Where attendance is not compulsory and the pressure is on, it can be tempting to make your excuses. But every time you do so, comms misses out on a voice at the top of the organisation.

Think carefully about what you want to achieve from the meeting before you attend and listen up while you are there. It is not enough just to report press stories or web traffic increases. Key things to get out of a meeting with trustees include:

- Demonstrate fully the difference that comms work is making to the organisation and its goals
- Discuss and/or agree new or potential projects
- Listen actively to what trustees and fellow department heads are saying. You will gain broader, richer insights into the work of your organisation, which will feed back into comms work.
- Make suggestions to influence other work areas. A comms perspective might add value to a non-comms activity.
- Offer comms solutions to governance and other problems where these might help ([see Part 2](#)).



My experience is that comms people report fairly ineffectively to the board, for example about media coverage. It's something that's barely discussed at the end and often it's a long list of press cuttings. It can look impressive, but it's not analysed or evaluated.

**John Williams, communications strategist and vice chair of the Association of Chairs**

Our external affairs director attends all board meetings and will very often present a paper or introduce a discussion. We are fortunate to have a chair who expects the management team to contribute actively to conversations at a board.

**Mark Atkinson, CEO, Scope**

Comms directors should listen and engage actively with trustees – to think, "I could help with that. Why aren't I being asked to contribute?" Either they need to be saying it at meetings or be behind the scenes afterwards and coming back with helpful suggestions through the right route.

**Gail Scott-Spicer, CEO of Carers Trust, CharityComms vice chair and trustee of Money Advice Trust**

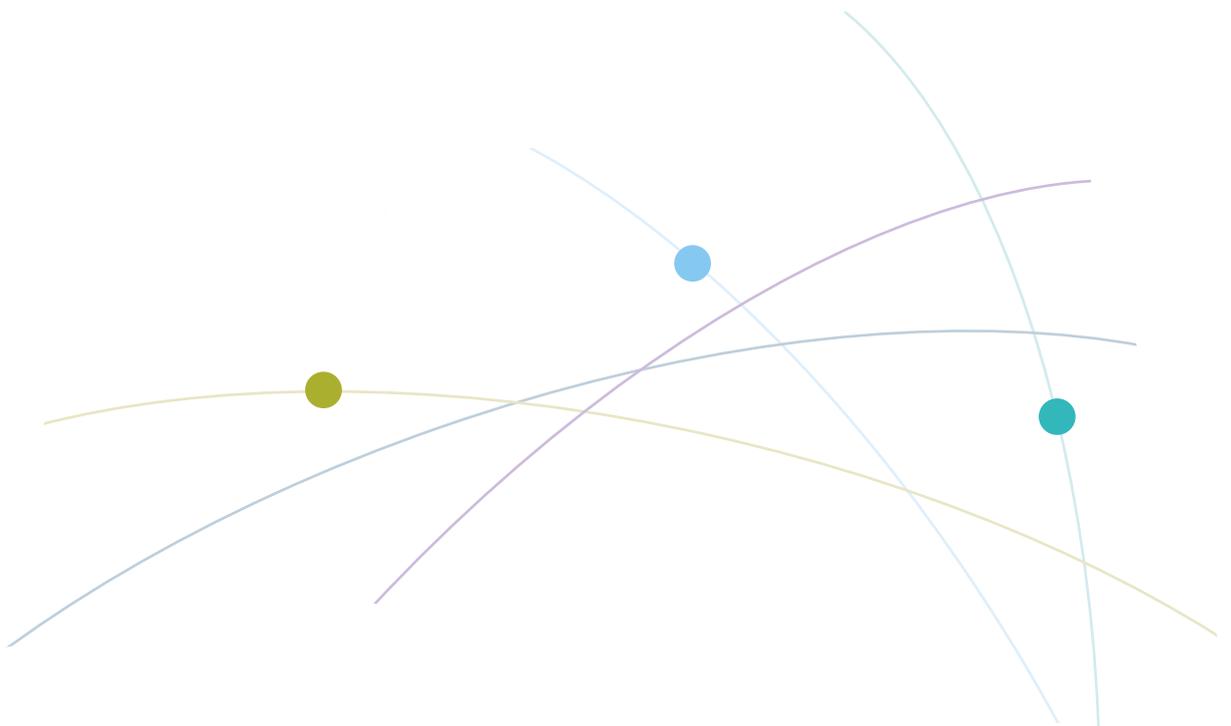
## Reduce resistance

Successful charities have a strong, influential communications function. If lack of access to trustees is an issue, the case must be made for a voice. There are many ways for a comms lead to go about building the argument:

- Forge a strong relationship with your CEO and ask them for a seat at board meetings.
- Take every opportunity to demonstrate to the CEO and senior managers how strategic-level communications will help your charity to achieve its goals ([more in Part 4](#)).
- Demonstrate how strategic comms helps the charity mitigate against risk ([see Part 5](#)).
- Propose PR/media/comms training for trustees. It will help make them aware of the strategic importance of comms to the organisation.
- Identify any comms-friendly trustees and take every opportunity that comes to meet or communicate with them.

- Flag up potentially interested comms experts or comms-friendly people you know when trustee vacancies arise.
- Make sure any board-level submission you are asked to make demonstrates the value of your comms work to the organisation.
- Make sure trustees are on the mailing list to receive great examples of your team's output.
- Be your own ambassador.

As Catherine Briddick, chair of Asylum Aid, suggests: "The first thing is to highlight to the trustees their legal and other responsibilities in ensuring that strategic obligations are met, and the important role of comms within that. Then convey your comms strategy for the organisation. Potentially you might be asking through the CEO to come and present to the board. That kind of upskilling – to see yourself managing upwards – is going to be crucial in these circumstances."



## Part 4. Strategic priorities: make the case

A strategic approach to communications allows coordinated, policy-led comms activity to progress the overarching strategy and goals of your charity. Ultimately, it helps trustees deliver on virtually every organisational aim and on every [governance duty](#) laid out by the Charity Commission (see page 4).

However, these things can only happen when the communications function enjoys recognition, understanding and influence at the top of the organisation.

If your trustees are yet to be persuaded of the critical, strategic role of comms in your organisation, keep clear arguments to hand. Hopefully your comms strategy has already done the hard work for you. A simple diagram or string of bullet points could demonstrate how comms helps deliver key objectives in the organisational strategy. The box below shows an example.

### Example – Organisational objective: Establish affordable housing for young people as a top-five priority at the next election

<b>Communications function</b>	Government influencing
<b>Communications objective</b>	Strengthen public discourse in the media on affordable housing for young people
<b>Communications KPI</b>	Double broadsheet and broadcast current affairs media visibility of policy on affordable housing for young people

From [Make it Matter: creating communications strategies in the non-profit sector](#)

Mark Atkinson, CEO of Scope, sees trustees as the guardians of the charity's brand.

As such he believes it's critically important that communications skills are valued and recognised as an important capability among trustees.

"With respect, if you've just got the operations and finance people, while that's good and important, it doesn't connect you to the external world, to the environment in which your charity is operating. You need people who can bring those things right to the heart of the discussion of the board. You've

got to make the pitch that good communications is critical to delivering any strategy."

Communications consultant John Grounds agrees. "Start with brand, strategy and narrative. The principle case for comms is: we are the way in which those things get communicated to the outside world. We, along with fundraising colleagues, are the principle interface between what the organisation is trying to do and the world it is trying to engage with. Just that fact ought to make trustees say: 'I get why this is important to everything we are trying to achieve.'"

### Engage the board with your comms strategy

Some comms teams approach the development of their communications strategy as an executive-only exercise. Others prefer, or are required, to brainstorm with trustees and seek board approval. The approach taken will be influenced by the culture of the organisation and, possibly, by the level of comms expertise on the board.



Up to this point, the comms strategy has been left to the executive and the management board. Trustees will see the strategy document and in some cases they might have an interest and will sign things off, but they don't get into too much detail.

#### **Peter Jenkins, managing director of external affairs, Leonard Cheshire**

We have separate fundraising and comms strategies. Both of them were drawn up by the CEO with senior managers. They were presented to the board and the board fed into them. Draft policy is circulated, experts feed in and then it is adopted. These strategies are two or three pages of A4, which link in to the strategic plan that the trustees draw up on an away day once a year.

#### **Catherine Briddick, chair, Asylum Aid**

Whatever the mechanism for arriving at your comms strategy, if your trustees are to understand what you are trying to do in comms, they will need to become familiar with its contents. Critically, they need to understand how the comms strategy links to the organisational strategy.

If comms is represented at discussions over the organisational strategy, the strategic direction for comms should not throw up too many surprises.

### Share findings on research and reviews

Taking part in board-level reviews of the organisational strategy, presenting to the board as part of your annual review process for the comms strategy and inviting discussion – all this will help foster understanding and acceptance of the strategic role of comms in the organisation.

Where possible, share with trustees any market research findings in support of your strategic planning. Trustees are generally keen for market insights, which can help them make business sense of your arguments.

John Williams, communications strategist and vice chair of the Association of Chairs, believes it's important to use research, not only for your own planning purposes, but also for communicating with your trustees.

"It will help make trustees curious about the reputation of their organisation, its standing, the strength of its brand," he says. "If you are giving a strategic presentation and you can say, 'our awareness rating is 10 per cent and our competitor's rating is 30 per cent,' well it's going to start a conversation."

### Establish relationships at a strategic level

For Deborah Alsina, CEO, Bowel Cancer UK, it's vital to ensure her board has the right skills to be able to help drive the organisation forward strategically.

"Right from recruitment, I'm talking to candidates about comms issues, to get them in the head space of thinking about why comms is so important and what more the charity should be doing," she says.

Relationships begin with recruiting the right trustees and inducting them. If comms is not currently involved with trustee inductions, talk to your CEO, offer your services, and make the most of the opportunity.

Having been inducted, trustees may get some form of comms training. There is no consensus on this. Budget considerations aside, some would rather train just the chair, or train trustees only on a 'need to do media' basis. On the other hand, something might be said for a basic grounding.

At Randall Fox communications agency, director Selina Fox has done a lot of training on first principles of strategic comms for non-communications people, including trustees.

"The first principles approach is about setting clear objectives, knowing audiences and so on," she

says. "At the end they have an understanding of the main principles of strategic comms."

### Be wary of tactical engagement

It's common for less comms-oriented trustees to propose or respond to an isolated tactical event – a new Facebook page, an article in the *Guardian*.

As one charity trustee told us: "Our board has little direct contact with our comms team other than when there are high profile events the board are engaged with. A couple of times I have worked with our comms lead to get an article in a relevant journal to raise our profile."

But in the absence of a strategic context, such interventions may not be helpful. Proposals (or worse, instructions) will lack a policy rationale. Evaluations of comms work may not be made against appropriate, fair criteria.

The solution is to build up strategic awareness.

### Check the strategic remit

Striking the right balance can be difficult. The terms of reference for trustees make clear that their role is about organisational governance and strategic thinking, but senior executives are the ones normally expected to devise and deliver strategy. Many smaller charities depend on competent trustees to help out with both strategic and practical work. Bigger charities will be more inclined to clarify boundaries, but executives may accept specific trustee contributions that add value.



Our board wants to have a relationship with professionals employed to lead our communications strategy. My job is to make sure it is appropriate – that they're adding value, not marking homework. You need to frame any conversation in a strategic space.

#### Mark Atkinson, CEO, Scope

There are times where, given our resource constraints, I will ask trustees to be more hands-on. For example, our comms trustee facilitated some meetings when we were looking at our brand proposition. He's very mindful of his strategic role, but I'm grateful when trustees are willing to lend their support and skills when asked.

#### Deborah Alsina, CEO, Bowel Cancer UK

## Part 5. Spotlight on reputation and risk

Recent difficulties have left many charities, and the sector at large, nursing damaged reputations. Often risks – for example, over reserves, fundraising methods or commercial relationships – were not identified or were inadequately managed. Trustees, who carry the ultimate responsibility for the reputation of their charity, are now keener than ever to protect their own organisations from injury.

We know that risk and reputation management are inextricably wedded to communication practice. Many of the problems we have seen over the last year appear to have arisen or been exacerbated by poor communications. The flip side is that good communications mitigates risk and strengthens reputations. So the argument for comms engagement at the highest level, and at every discussion about risk and reputation, could hardly be more compelling. In charities where this engagement is currently lacking, the argument must be made as a matter of urgency.

“The first thing is to sit down with the chair and secure his or her endorsement about getting more engagement on reputational issues,” recommends John Williams, communications strategist and vice chair of the Association of Chairs. “It shouldn’t be a difficult conversation to have, given everything that’s happened over the last 12 months.”

### **Establish comms as the reputation manager**

Trustees are the custodians of reputation – they need to know, and will intervene to ensure, that the appropriate systems are working. But it’s clear that they want and need to be advised on reputation issues by the comms team. This is a job for the expert paid professionals, who should be proactive in regular discussions and decisions, not just when crisis strikes.

“Our comms team is small and the comms director is quite new so doesn’t take a very active lead on this,” one charity trustee tells us. “The external affairs director is more aware of the environment and provides some input, as does the CEO. Overall, though, issues of reputation management tend to be led by the trustees... Once the individuals have more experience, I would hope they would anticipate potential problems and advise trustees on how to handle them.”

A trustee of another charity complains of having very little engagement over risk and reputation management with their current comms team.

“My engagement is through the chief executive. This does not work particularly well. I am learning that even where the organisation is smaller, there needs to be more contact between the board and the senior executive team.”



Amnesty International UK Section operates in a contentious space, so is very aware of and experienced in dealing with reputation management issues. As a key priority, reputational risk is in AIUK’s strategic risk register. The board discusses the management of specific issues. The director of supporter campaigning and communications attends every board meeting to advise the board and to hear the board’s views.

On a day-to-day level, as a matter of practice, key initial conversations are usually between the CEO and/or director of supporter campaigning and communications and AIUK Section board chair. There is trust and a willingness to be open and engage governance at an early stage. This works really well and as AIUK Section chair I was given early warning of and involvement with the management of issues. This was in weekly calls or in between, depending on the nature of the issue and/or level of risk. Other board members are brought in as appropriate.

**Sarah O’Grady, trustee, Amnesty International UK Charitable Trust and former Amnesty International UK Section chair**

We meet with our trustees regularly to talk about governance, editorial policy, sign-off, and all the different mechanisms we use to minimise or mitigate against risk. I also have monthly meetings with my comms trustee, who happens to be chair of the trustees, about how we ensure the public sees the good we do – not just criticism. She will ask me: Is there a strategy in place? What are you doing about risk? How do we get on the front foot? How do we pre-empt attacks on our reputation?

**Jack Lundie, director of communications, Oxfam GB**



The board needs to know that the organisation is being confidently managed, that policies are in place, including a strategy for dealing with emergencies, and that the executive will bring issues of major concern to the board if they arise. If something is likely to break, I have to trust that I am going to hear about it between board meetings.

That comes back to the relationship between chair and chief exec. As chair I would not want to think that the chief exec was the only person managing and reporting against risk. I think it is very important that you are also hearing from someone else in the team.

**Carole Easton, chair, Young Minds and CEO, Young Women's Trust**

### Ensure comms involvement in risk planning

Most charities keep a register or similar document that itemises and assesses major risks to the work of the organisation. Risks to reputation should have a prominent position on the list.

It is crucial to ensure comms is involved with drawing up, maintaining and reviewing the document. By gaining agreement on this one principle, you ensure an appropriate footing for comms at the strategic level of risk management. Minor departmental risks can be monitored and managed by the team concerned.



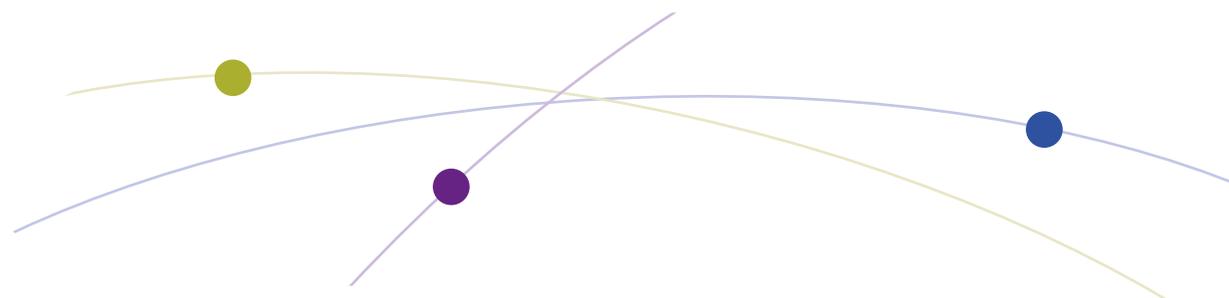
We have a corporate register of risks at a certain level, on which we report to the board. Other risks are managed elsewhere in the organisation. The biggest single risk that we have is around reputation. Because of the interdependence of other risks – whether relating to poor financial performance, a quality issue in one of our services, or a sector issue – they all point back to a risk to reputation. We also keep a separate, detailed, constantly-changing internal list of reputational risks to the organisation. Some are very big and some very small but for every single one there is a communications plan. Our trustees won't necessarily go to that list. But they will see reputation issues listed on the corporate risks register and they will ask for examples of what is driving the assessment of those risks.

**Mark Atkinson, CEO, Scope**

We run very large social care services. Things sometimes go wrong. It's inevitable. We deal with people, in some cases people who are very ill or have complex needs. So when things go wrong, we have a system in place where we have to alert senior staff, trustees and the chair. The board has a specific role in crisis comms.

**Peter Jenkins, managing director of external affairs, Leonard Cheshire**

The comms team should have developed a crisis communications plan linked to the risk register. Make sure your trustees are familiar with its contents. If appropriate in your setting, arrange crisis scenario training for key trustees. If you haven't done so already, download a copy of CharityComms' best practice guide to [Crisis communications for charities](#).



## Part 6. Social media

### Establish social media policy

In the current environment, social media is a pressing concern for the trustee/comms relationship. The onward march of digital offers all kinds of operational and governance opportunities for charities, some of them comms-related of course. At the same time, social media in untutored hands provides an abundance of ammunition for higher-profile media attacks.

As Peter Jenkins, managing director of external affairs at Leonard Cheshire puts it: "Digital is the thing that can explode much quicker than anything else. It could be one wrong tweet, a debate online that goes wrong quickly. A whole host of things. Often people who think they understand comms only understand one element of it."

Once again, the challenge comes back to a critical need for comms to be accorded top-level status and influence in the organisation. In the absence of a social media policy steered by comms experts, trustees – even more so than staff, volunteers and supporters, because of their seniority – can unintentionally do serious damage to their charity. It could be by posting an ill-timed or ill-judged comment, or failing to prevent the leaking of sensitive information by others. Comms teams need to ensure they develop a robust policy and get trustees signed up to it. Enlightened trustees will be only too keen to bow to expert knowledge.



On social media, people have to be allowed to be themselves. But if they are going to take to social media and be a Samaritans trustee, then I would expect them to engage with our social media team, just to discuss the rules and regulations around it. We've got guidelines on social media that the comms team has prepared.

If trustees are resistant, I would encourage comms to push that back to the CEO and the chair, because it could be a real problem. You can spread the wrong message so easily, it will be in the papers and on the front page of the *Daily Mail* before you know it. In general I would hope trustees are responsible enough, if the point is explained to them, to understand the issues and the risks.

**Jenni McCartney, chair, Samaritans**



Trustees are generally not great users of social media, mainly because of their age profile. But they are increasingly aware that they need to be.

**John Williams, communications strategist and vice chair of the Association of Chairs**

### Work together on digital

Perhaps you want to help your trustees get to grips with social media, but you're not sure where to start. Charity sector digital comms expert Zoe Amar of Zoe Amar Communications suggests the following to get the ball rolling:

- **Set the scene:** Whether they're keen to know more or nervous of digital, trustees often lack context on how digital comms feed into organisational strategy and governance, along with other key areas such as data, digital fundraising, culture and leadership. Help them understand not only the trends, but the opportunities and risks and how digital and organisational strategy are merging into one.
- **Tell the story:** High quality internal reporting of digital stats is great. However remember that boards often have information overload, so find ways to help them engage. Encourage them to ask questions, or tell them the story behind the numbers by providing qualitative data as well as quantitative data. For example, why not include tweets from key stakeholders alongside campaign data in reports for your board?
- **Brainstorm together:** If you really want your board members to take an interest in digital, ask for their opinions and ideas. They may not be digital experts, but they are likely to have a wealth of insights and ideas to offer in other areas. A session where you help them understand what the digital team can do to achieve the organisation's goals could unlock their understanding of digital.
- **Be patient:** Most charity boards are at very early stages of engaging with digital. It may take months or even years for them to develop the kind of knowledge and skills that they need. Keep supporting them and it will pay dividends.

# Part 7. Spotlight on the fundraising/comms dynamic

## Get to grips with regulation

Following the difficulties of the last year, charities are getting to grips with a new climate of fundraising regulation. The *Charities (Protection and Social Investment) Act* of March 2016 introduces new rules about how charities can raise money. They relate, among other things, to social investments, agreements with commercial fundraisers and the kind of fundraising information that must be included in annual reports.

An independent **fundraising regulator**, paid for by the charity sector itself, has replaced the Fundraising Standards Board. Working closely with the Charity Commission, its aim is to strengthen the system of charity regulation and restore public trust in fundraising. It will set standards for fundraising practice, investigate concerns and complaints, and operate a new fundraising preference service to enable individuals to opt out of fundraising communications from charities.

John Williams, communications strategist and vice chair of the Association of Chairs believes a key failing of fundraising in the last 12 months is that donors were not necessarily seen as stakeholders to be nurtured but “more as cash cows to be milked.”

He says: “We have a duty of care to such people, not just to our beneficiaries. We need to nurture our relations with all our stakeholders – to understand who they are, what they feel and how they could impact on the organisation.”

Comms teams need to stay on top of developments and take responsibility for sharing pertinent updates with trustees as well as the wider organisation.

At Scope, CEO Mark Atkinson says his board wants to be very clear about its responsibilities. “Our director of fundraising will give a short presentation, and then the whole executive will contribute to that discussion. As a management team, we are keeping on top of this anyway, so we can say: ‘Look, this is what you need to know as trustees about the emerging regulatory environment; these are what we think the conditions are for the charity; these are the risks; this is how we are managing them; this is our comms position.’”

## Take care with fundraising-related comms

Some of the changes will impact, directly or indirectly, on comms output – on how we are communicating with potential donors and what details we are communicating about the charity’s fundraising work.

Comms and fundraising teams in many charities already work closely together. In the new climate, it will be important to collaborate more deliberately on issues that sit between the two disciplines. Joint working on these areas through dedicated sub-committees might also make sense to your trustees from a governance perspective, and could win more clout for comms at board level.



The whole thrust of the tighter regulation is that fundraising has been too aggressive, too incessant. In the engagement we have with potential fundraising audiences, there needs to be more emphasis on communication that’s not just about asking for money, but is delivering value into a relationship. That clearly increases the burden on us to put out comms that demonstrate value and to share stories of impact about the work we do. We are working together with fundraising colleagues on that, and as the new regulation kicks in we are trying to be ahead of it by communicating in a more conversational, more value-based way.

**Jack Lundie, director of communications, Oxfam GB**

Our finance and resources committee is constantly monitoring our fundraising income and how we raise it. But obviously strong marketing and communications are important from a fundraising angle, so we are going to re-form a fundraising and comms subcommittee to look at that integrated function. It will probably include a number of board members, but also with some people co-opted from outside. We want to be at the best practice end, not the catching up end.

**Deborah Alsina, CEO, Bowel Cancer UK**

## Part 8. Tell trustees: “Hold comms to account”

Trustees must be well-informed about the charity they serve in order to fulfil their duties to support and protect its work. There are many ways a trustee goes about staying well-informed, not least through meeting and talking with other trustees and senior executives. But comms clearly has a special role in this area.

Simply encouraging trustees to access the normal outputs of a strong comms function will provide crucial pieces in the jigsaw of their knowledge and understanding. However, as discussed elsewhere in this guide, comms professionals can do more to help trustees meet their responsibilities. They can brief and advise trustees directly, and help ensure that communications throughout the organisation – ie not just formal comms team channels – are open, accessible and transparent.

Of course, most comms departments are busy enough without offering add-on services to trustees. There is always a balance to be struck, but top-level influence comes at a price. Besides, trustees have the right and the responsibility to hold their comms team to account. In order to do that, they need to be clear about the remit of communications work and the support they can expect to receive.

As part of our research for this guide, we asked our expert interviewees “What does your board expect from its communications department?”. Here’s what they told us:



I expect the comms team to work in an integrated way with the rest of the staff, to work proactively as well as reactively – for example to be able to ‘horizon scan’ and obtain the information they need internally from other teams. I expect them to react quickly and calmly in times of crisis. I expect comms to be accurate, consistent with Amnesty International’s mission and core values, and with an understanding that sometimes the language used has to be different when dealing with governance matters. The AIUK staff delivers all these and more!

**Sarah O’Grady, trustee, Amnesty International UK Charitable Trust and former Amnesty International UK Section chair**

We have a chair who has a deep understanding and an interest in comms, and wants to be kept informed weekly about what we do. We also have a detailed newsletter that we put out, not only about our press cuttings, but also about what’s going on in the wider sector, media and parliamentary stuff, and so on, and all trustees expect to get that daily.

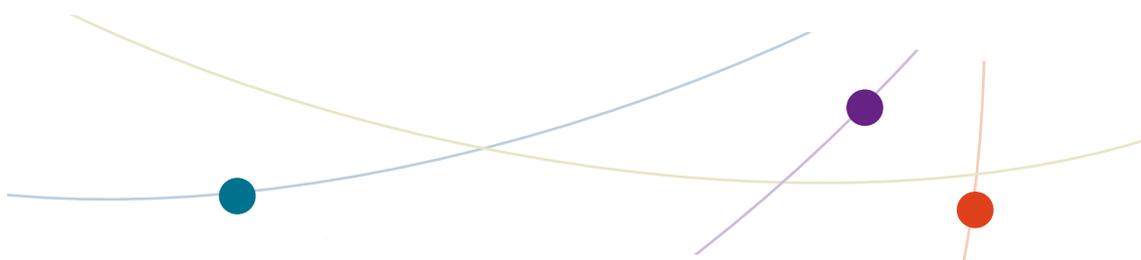
**Peter Jenkins, managing director of external affairs, Leonard Cheshire**

The line of sight from the board through the chief executive is an important one to maintain, but a skilled comms team (or other executive function) should help the board better to understand the part they can (and should) play.

**Dr Alice Maynard CBE, director, Future Inclusion**

How does comms speak to the main question of the organisation’s continued existence and whether or not it is thriving? Getting trustees’ noses off the financial pages is the thing. You’ve got to show where comms fits in, in terms not just of fundraising but also risks and other issues as well.

**Catherine Briddick, chair, Asylum Aid**





My board asks me: how is investment in our comms function going to enable the charity to meet its mission? They should expect me, as the CEO of the charity, to be able to articulate why investment is needed and how it will add value. Lots of comms teams – particularly when you have very little capacity as mine had – can end up just servicing other teams, whereas now, with board support, we are investing so we can carve out a proactive comms agenda.

**Deborah Alsina, CEO, Bowel Cancer UK**

They expect us to deliver Oxfam's comms in a clear, accessible, on-brand way and to defend our reputation and mitigate against reputational risk. It's about managing the expectation and the mandate.

**Jack Lundie, director of communications, Oxfam GB**

Trustees are responsible for the financial wellbeing of the organisation; for its behaving appropriately as a charity and abiding by any charity laws; for the reputation, the strategy and the performance. How can comms activity help trustees fulfil their responsibilities in achieving these things?

**John Grounds, communications consultant and CharityComms chair**

If we were to close or transfer a residential care home, our trustees would ask: How are we communicating this to key stakeholders? What are the key messages? Who is speaking for the charity? They would expect to see how we are communicating on their behalf a position that the board has taken.

**Mark Atkinson, CEO, Scope**

## Encourage questions

The Charity Commission suggests 15 questions trustees should ask about their charity's governance, finance and resilience. In similar vein, based on our findings for this guide, here are 10 questions you could encourage trustees to ask of you:

### 10 questions trustees should ask comms

- 1 What can you bring to the development of our organisational strategy?
- 2 How do your comms strategy and activities progress the strategic aims and objectives of the charity?
- 3 What can you do to protect our reputation and mitigate risks?
- 4 Can you provide us with a daily/weekly/monthly briefing about internal and external issues and how these could impact on the organisation?
- 5 Will you coach us as needed – in social media, press interviews, crisis communications etc?
- 6 What oversight can you offer to other departments to help us ensure quality control of information flowing within the organisation and to outside audiences?
- 7 How can comms help us ensure transparency and integrity in the dealings of the organisation?
- 8 How can comms help us ensure the charity acts out its stated values?
- 9 How is comms working with fundraising to ensure donor communications meet changes in the fundraising environment?
- 10 How can comms help us to demonstrate our impact, service quality and value for money?

You might want to adapt the questions to suit your charity's particular culture and challenges. The idea is to help trustees understand the strategic role that comms should be playing in their organisation – and how comms can help them in their own work.

# Acknowledgements and thanks

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director of communications, Oxfam GB

**Dr Alice Maynard CBE**

director, Future Inclusion

**Jenni McCartney**

chair of Samaritans

**Sarah O'Grady**

trustee, Amnesty International UK Charitable Trust and former Amnesty International UK Section chair

**Gail Scott-Spicer**

CEO of Carers Trust, CharityComms vice chair and trustee of Money Advice Trust

**John Williams**

communications strategist and vice chair of the Association of Chairs

**About the author**

Kay Parris is a freelance writer, journalist and editor with a particular interest in the voluntary sector. She has worked in editorial and communications roles for many non-profit organisations, including ActionAid, The Big Issue, the International Transport Workers' Federation and the United Reformed Church – as well as serving a stint as internal communications manager for the London Borough of Camden.

She has also contributed to a wide range of consumer magazines and leads workshops in writing and communication skills.

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