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AIM Guides for Boards

Running an open recruitment process

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It's not who you know, but who you don't yet know...

Introduction

Does your museum find it difficult to recruit new trustees?

Perhaps you've usually recruited new trustees from your board's existing network of contacts, or struggled to get well-qualified people in post.

If that's the case, an open recruitment process can enable your museum to look beyond who your board already knows, to find those people you don't yet know. Advertising trustee roles more widely not only attracts greater numbers of potential trustees, it can also help you to diversify your board and find people with the skills and experience your organisation needs for the future.

This guidance note gives you simple, practical advice about planning and running an open recruitment process.

Who do you need?

Identifying who you need on your board is the most important part of any recruitment process, so it's worth spending time getting this right.

Skills for the future

A review of your museum's strategy or business plan is a good place to start. As your organisation's plans evolve over time, so the mix of skills and experience needed to lead and oversee these plans will also change.

You can identify what skills and experience your board needs now and for the future by mapping your organisation's key priorities for the coming 1 – 5 years against the skills needed to lead and oversee those priorities (see figure 1).

Remember to consider how you're going to deliver your organisation's priorities, since this will affect which skills you want on the board and which you want in other parts of your organisation (e.g. employees, volunteers). For example, if you plan to use specialist consultants to introduce a schools' programme, you may not need an education specialist on the board, since the specialists will bring with them the skills your organisation needs. The killer question in these cases is 'Does your board know enough to hold people to account in this area?'

Once you've identified the skills you need on the board, you can create a skills audit by asking trustees to rate their level of competence in each of the skills you identify. Collating the results will highlight any gaps in skills amongst your current board, so you can target your recruitment to find people with the skills you need.

Skills audits are sometimes accused of being a blunt instrument, and it is true to say that they rely heavily on personal ratings, which can be highly subjective! As a result, they are most valuable when used to prompt conversation amongst board members.



If you only do one thing...

...take time to talk together as a board about the skills you have and the skills you need now and for the future. A round table debate can work just as well as a paper skills audit, or if you fancy a more light-hearted approach, how about a 'speed dating' session? Here, each trustee spends a couple of minutes 1:1 with every other board member talking about the skills they bring to the board, the top priorities they see for the museum and the skills they think the board is currently lacking. This approach often prompts much laughter and the informality can help people to feel more comfortable talking about their own skills, as well as raising concerns about the skills the board is lacking.

Figure 1

Priority/objective	Skills, expertise or knowledge		
Diversify income streams	Commercial or retail management	Marketing	Local business connections
Introduce schools and family events programme	Education/teaching	Marketing	Young family?
Review governance approach	Leadership	Managing change	Team working

Succession planning

When considering who you want to recruit onto your board, you'll also need to understand the changes that may take place in your existing membership in the next 1 – 5 years. Do any current trustees want to retire? When are they planning to go?

Some organisations have clauses within their governing documents that provide a framework for succession planning (e.g. maximum terms of office, arrangements for trustee rotation), whilst others do not. Even if yours does not, there are ways to introduce succession planning into your Board's working practices.

If you only do one thing...



...ask your current trustees about their plans. Make a list of trustees, including their reflections on how long they anticipate staying on the board and any information about when their terms of office will come to an end (if applicable). Review this list annually to help you plan in advance when to recruit new trustees.

Diversify

There are strong reasons to create a diverse board of trustees. Not only does the Equality Act 2010 give an imperative to promote equality of opportunity, but a diverse board can also help your organisation increase accountability and public confidence, as well as gain the benefit of a range of views that reflect your organisation's local community, visitors and service users.

As a board, it is important to consider your objectives for diversifying your membership. For example, perhaps your organisation is looking to develop its work with minority communities who aren't currently represented on the board, or maybe you need younger people who have current experience of working in museums to help the board oversee the operational management of your organisation.

An open recruitment process is a good way of increasing board diversity, as it enables you to target where you advertise to reach the people you want to attract. However, it is not sufficient in itself. Your board may also need to consider whether its working practices suit the people you want to attract. For example, would daytime board meetings deter young professionals from applying, or could a more accessible venue encourage disabled people to join your board?



If you only do one thing...

...ask yourself these questions:

- What do you want to achieve by diversifying your board?
- Who do you want to attract?
- Where could you advertise trustee vacancies to attract these people?

Legal eagle...

At this early stage, you should also check if there are any legal restrictions that might affect who – and how – you recruit and select new trustees. For example, your governing document might include clauses relating to maximum numbers of trustees, procedures for nominating or electing new trustees, or trustee terms of office.

How do you find the people you need?

1. Write a role description

The main purpose of a role description and person specification is to set applicants' expectations about the trustee role and to give them enough information to assess whether they want to – and are eligible to – apply. It can be useful include the following headings:

- About your organisation;
- Main responsibilities of the trustee role;
- Practicalities (e.g. time commitment, meeting schedule, terms of office and appointment procedure);

- Skills required (including specific skills like marketing, as well as the interpersonal skills needed to work well on a board, such as leadership and team working);
- Eligibility criteria for trusteeship.

2. Write your advert

"In our factory, we make lipstick.
In our advertising, we sell hope."
(Peter Nivio Zarlenga)

As with lipstick, advertising a trustee vacancy advert is an exercise in selling hope. Use your advert to focus on why trusteeship at your organisation is such a good opportunity. You could include:

- Your organisation's Unique Selling Point – people often become trustees because of an affiliation with the cause or work of an organisation;
- The benefits of becoming a trustee;
- Why it's a good time to join your organisation now – what exciting plans do you have that new trustees could be involved in?

As a rule, vacancy adverts should be short and punchy, providing enough information to whet the appetite and then tell applicants how to sate it (e.g. where to get further information, how to apply). Most of the detailed information you need to convey about the role should be in the role description or other supporting documents.

3. Decide where to advertise

Running an open recruitment process doesn't mean you can't also use your existing networks to advertise vacancies. Often these networks can bring forward applicants who already have an interest in your organisation or who you know have the skills your board needs. However, if you do advertise to your networks, you may need to set people's expectations about the recruitment process. For personal contacts that you might approach, make it clear that you're inviting them to submit an application, rather than inviting them onto the board directly.

When you're considering other places to advertise, think about what sorts of media are most likely to reach the people you want. Some ideas include:

- Existing networks (e.g. personal contacts of trustees or employees, volunteers, Friends groups);
- Local media – writing an editorial and sending it to the local press is an excellent way to get free advertising;
- Local organisations (e.g. other museums, community groups, volunteer centres);
- Heritage sector organisations (e.g. AIM, regional Museum Development Agencies)
- Online – there is a list of websites where it is free to advertise trustee positions in the Further Information section.

Selecting the best people for the role

Some people have reservations about actively selecting trustees for vacancies using informal interviews or other approaches. Indeed, it can seem incongruous to interview people who are offering to give their time freely to our organisations. However, failing to find out more about applicants can have disastrous consequences: the trustee who looks great on paper, but lacks the interpersonal skills to work on a board, or the person who feels they will be 'doing you a favour' by becoming a trustee, so doesn't feel committed enough to come to meetings.

Given that you might be asking someone to commit to your board for an initial term of 3 or more years, it is important to be as certain as you can be that they are suitable for the role.

1. Shortlisting

To avoid having to meet with all the applicants from an open recruitment process, put together some criteria for shortlisting and review the applications against the criteria. Once you have a shortlist, you can arrange to meet shortlisted candidates for informal interviews.

2. Informal interviews

Interviews should usually be conducted by 2-3 trustees, though they may involve other stakeholders if that is appropriate. Holding an open day, which includes an informal interview and a tour of your museum, can be a good way to involve more of your board, employees or volunteers in meeting applicants, as well as giving applicants the chance to get to know your organisation before joining.

Create a list of questions for your informal interviews, so you can assess candidates' answers fairly and consistently. You could include questions about:

- Their motivations for applying for trusteeship in your organisation;
- Their understanding of your organisation's work;
- Their understanding of the role and responsibilities of trustees;
- Examples of times they have demonstrated key skills for the role;
- Their expectations of what they will get from the role and how much time they have to commit.

3. Following up...

Once you have chosen your new trustees, there are two final responsibilities to conclude your open recruitment process. Firstly, undertake the checks needed to ensure the individual is eligible to become a trustee. It is also good practice to request references for new trustees.

Secondly, make sure you respond to any unsuccessful applicants with constructive feedback. Whilst this can feel time consuming, it is vital for maintaining your organisation's professional reputation, and for keeping unsuccessful applicants engaged with your organisation in other capacities (e.g. as a visitor or volunteer). After all, in 5 years' time, your organisation's goals might have developed and unsuccessful applicants from this recruitment process could have just the skills you need for the next phase of your museum's plans...

Further information

Getting on Board, The looming crisis in charity trustee recruitment, (2017)

NCVO, Good practice in trustee recruitment toolkit, (2006)

Charity Commission, Finding new trustees: What charities need to know (CC30), (2012)

Websites for free advertising for charity trustee roles:

www.aim-museums.co.uk/

www.do-it.org.uk

www.charityjob.co.uk

<https://www2.le.ac.uk/departments/museumstudies/JobsDesk>

<https://reachskills.org.uk/charities-non-profits/find-trustee>

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