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**Thoughts on Trustee Recruitment: Finding the right people for your organisation.**

Notes from Frank Hargrave (Director of Colchester + Ipswich Museums) on recruiting for Colchester Museums Development Foundation

(from a SHARE Museums East discussion session, December 2020)

Background

The Colchester + Ipswich Museums Service (CIMS) is local authority – a very unusual service in that it is a joint initiative funded by both Colchester and Ipswich Borough Councils (Colchester in Essex and Ipswich in Suffolk). Before starting in Colchester a couple of years ago, I was director of an independent museum up in the North West – Norton Priory Museum and Gardens, which was a charitable Trust and company limited by guarantee. I wanted to find ways of transferring the mechanisms for fundraising I regularly employed at Norton to Colchester + Ipswich Museums.

We wanted our Foundation to be a little more than just a fundraising wing. Knowing we would have to recruit trustees we thought about what the autonomy of the board would look like and the kind of leadership we would expect from them. At the same time, we also saw the opportunity to bring in new voices and decision making. Like most museum services, we are not very diverse and although we are now looking at ways we can diversify our workforce, change is unlikely to be swift. **Trustee boards however, can be more dynamic.**

Board diversity

It is a quick win – having a diverse board, but I doubt I am the first person to observe that it is easier to recruit for trustees with protected characteristics than it is to diversify the staff workforce. Now, why is that? **And do organisations really query diversity in organisations that show a diverse board but whose workforce is white, middle class and non-disabled?** Is that question being asked?

It’s something on my mind at the moment, that the diversity represented by the Colchester Museums Development Foundation (CMDF) board has a genuine voice, has leadership but still sits comfortably with the original aims of the foundation. And unlike the board of a Charity that for instance manages a museum service, that manages operations and staff, the remit of something like a development foundation can be quite tightly focused to ensure that we can be really clear on direction and autonomy. **Good, upfront and honest conversations at the point of recruitment are critical** to that as any hint of tokenism or a lack of genuine autonomy would be sensed a mile off and the Foundation would fail.

Instead what we want from the Foundation, and I think we have, is a **conduit for voices that we’re currently not hearing at a leadership level in the organisation, empowered by money to actually invest in the areas that it sees, in partnership with us, as the priorities**. In the past I have been encouraged to set up community panels to provide this kind of direction but in my experience these kinds of groups can be very difficult to maintain where there is little actual investment. They can even become negative experiences for those involved when they are not given resource to direct.

Recruitment process

We envisaged a two-stage process:

* Firstly, cast the net through a **press release** together with **social media posts** and a modestly boosted but targeted Facebook campaign. We also produced a film cheaply, it’s a hotchpotch of footage we had from a different project, to support the social media posts and feature on a webpage with additional information. **It’s important as I think people are interested in people and a film offers a tangible and relatable window into an organisation**. The additional information on the webpage did include our expectations – particularly the likely time commitment but it was a long way off from a role description.
* In the meantime we envisaged scouring our contacts and our contacts’ contacts and making some **direct approaches**.

**Format of advertisements**

The advertisements varied for the format as you can imagine. The local newspapers picked up the press release as a very flattering piece which may have helped its circulation but generally the ads were quite **brief and unspecific**. There were a couple of reasons for that and it perhaps flies in the face of what it is typically understood in terms of the recruitment of trustees. In the past I’ve been told that good recruitment relies on a number of far more specific criteria:

* That you should define the different trustee roles and create individual ads for each
* Outline role descriptions, detailing the skills you are looking for and your expectations such as the kind of commitment to expect.
* For established trusts, the above would follow from a skills audit.

The main reason we didn’t follow these principles was obviously that **we were looking to recruit an entirely new board so detailing a number of different roles would be difficult to communicate**.

Secondly, **we wanted a board that represented our communities** – that meant that some of the individuals whom we might hope to attract, might not be familiar with the language, procedure and understanding around trusteeship so **adding layers of complexity could only serve to be more inaccessible -** a recognition that if you are not familiar with what can be a pretty archaic structure, wound up with laboured legal speak and terms, you are unlikely to be excited by it.

Trustee boards, even more so than the world of work, are really **dictated by personality and personal commitment**. I remember one trustee at Norton Priory who on paper probably wouldn’t have met the criteria of many of the role descriptions you might think to write but she was phenomenal. She was PA to the director of a local housing trust. Her passion for Norton Priory infected her colleagues, including the director and subsequently we benefited from tens of thousands of pounds of maintenance support for our buildings, IT support, equipment, mutual projects and marketing. She had been a volunteer for us prior to becoming a trustee and the passion, commitment and positivity she possessed had an extraordinary impact on the board. I’ve also seen the reverse, where **a negative influence turned a board upside down**, **despite an impressive CV**. Then there is the common, well-meaning trustee but who doesn’t really have either the time, or the commitment to be effective. Whilst I can certainly see the logic of doing a skills audit and then looking to recruit for the missing skills, **how much do you really identify commitment and enthusiasm in the recruiting processes?**

[In this AIM guidance](http://C://Users/CBC11549/AppData/Local/Microsoft/Windows/INetCache/Content.Outlook/C3L127JY/AIM-Guides-for-Boards-Running-an-open-recruitment-process.pdf) it mentions the **necessity of interviews** or similar mechanism and I would certainly agree with that. Friends or other close contacts are often brought in as potential trustees by Board members and it **needs recognising that that could create problems**. As a result interviews for those individuals need to be conducted without the friend. Boards can become cosy little friendship groups which are quite nice but not really very effective or good from the point of the Charity Commission and public in general.

**So, with some of this in mind, is there a danger of recruiting highly qualified ineffective trustees?**

To a certain extent of course it depends on what you are looking for. With the CMDF I think we could afford to be very open minded. When you do that audit of the skills that you need you may find yourself writing a list saying – diverse, fundraising skills, collections experience or at least interest in museums, wealthy or at least well connected, business leaders and so on.

You might not expect all of those attributes from one person but put an ad out there with many of those things on and you are making for a very shallow pool. **Do you need to be that specific?** And I think it’s worth really questioning those skills that you might take for granted as needing. We have museum specific skills in our organisation so replicating it in the board may not only be unnecessary, but it may actually present a challenge. **For very small museums, largely if not solely run by trustee volunteers that professionalism is vital but for museums with staff, a museum professional on the board may be far less necessary.**

From a larger pool you might be able to find the special individuals like I mentioned at Norton, particularly **if you ask the right questions.**

The AIM document I think provides a good idea of what those open questions might look like:

* **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.**

Arts Council England have recently provided **guidance to good practice** (<https://www.artscouncil.org.uk/guidance-and-resources/culture-change-toolkit#section-1>) as well as making a firm commitment themselves. They include some of the things I’ve mentioned – clear language in job descriptions and ads, removing qualifications unless you really need them, removing anything that assumes prior knowledge and anything that indirectly discriminates.

At CIMS, as a medium sized service we are able to draw on a pool – albeit a very small pool – of colleagues who represent in some way many of the protected characteristics and are therefore able to advise on our job descriptions and where we advertise. We do that through a **newly formed advisory group**. However, we have some experience already of the success of these approaches to recruitment from our trainee scheme – the Transforming People to Transform Museums programme funded by the NLHF. In that scheme qualifications were stripped out, language made more accessible, application forms replaced by a simple process and yet still we were inundated by graduates.

Where improvements have been made is where there has been **direct intervention** – the manager of the programme working directly with the job centres in Colchester and Ipswich to speak to individuals who would not think to apply and didn’t actually know how to. This year, we have taken further steps to diversify recruitment for that programme but the problem persists for our other roles and I suspect the same could be said for other organisations taking this approach. The problem I believe lies before the recruitment – with the perception of museums generally as well as what museum work is or can include. The trick perhaps then, particularly for trustee recruitment, is more flexible as - bluntly - you can positively discriminate to clearly communicate what the role or roles could look like.

**What happens if you don’t get the applications that represent your community?**

We had a good number of fantastic applications, but none that offered significant diversity. To improve that, we had to take the more direct approach. Again, we were aided by some of our other work. As a National Portfolio Organisation over the last two years in particular, we have developed a number of programmes – supported Black History Month every year, developed co-curation practices for our exhibitions, founded relaxed openings and delivered activities centred around LGBTQ+ audiences.

* **We spoke to a couple of individuals we knew** through these programmes. I simply phoned them up and had very honest conversations – said we were rubbish at some of the work, wanted to be better and I thought the Foundation could help with that. I didn’t pretend that it wasn’t a fundraising wing though, it absolutely is and it would have been disingenuous to pretend otherwise. I then invited them to say what they thought it could look like.
* We did also **think back on some of the people who we had worked with in the past who we knew to be highly effective and would bring something to the board**. Our current chairman is an access consultant who worked at CIMS seven or eight years ago and I had a chat with her. Another individual we approached, we didn’t actually know. In her case we were aware of her interest in culture generally as well as her professional expertise and so approached her through a mutual contact to see if she would be at all interested.

In all cases we had informal interviews over Zoom. Our questions to them were similar to the ones in the AIM document I mentioned – open, focusing more on what their motivations were and the time and commitment they were likely to be able to offer rather than their skills. We had their CVs after all. We also – and this isn’t an easy thing to do I appreciate – **made a judgement on their values**. Diversity brings with it some sharply contrasting viewpoints and whilst most people look for compromise that isn’t always the case and a **radical viewpoint, however well-meant, can be destabilising. Likewise, overwhelming neutrality would also have been unhelpful.**

Constitution and legalities

Following this we settled on trustees and organised a couple of meetings – again, over Zoom due to the pandemic during which we looked at how well everyone got on, the ideas being generated that kind of thing.

All really informal at that stage before making decisions on, for example, the type of charity to be founded. In the end we settled on a **Charitable Incorporated Organisation – a CIO**. Essentially, all of the benefits of the more traditional Charitable Trust and Company Limited by Guarantee model seemed to be there, without the hassle of bothering with Companies House. I am delighted to say, decision making was swift, the group got on really well – the kinds of conversations already being elicited were really interesting.

Again, because I wrote the constitution, using a mixture of the template supplied by the Charity Commission and a helpful example from another service, I actually understood it, which meant I could consult properly with the new trustees over its content. I think that was useful, particularly in instilling confidence that things were being done correctly. Specifically too, I think it was useful when we were for instance **looking at succession planning and I spoke to all of the trustees about their terms and therefore the cycle of loss and recruitment of the next four to eight years.**

We submitted the application to the Charity Commission about a month ago and about three days later it was formally registered.

At the first official trustee meeting – actually the week before last, there was a lot of **conversation about objectives**, which then evolved to a conversation about a mission with short and medium term objectives. It was apparent at that point that actually there were some differing views around the role the Foundation is likely to have going forward. Essentially, many of the trustees, probably myself included, joined with many preconceptions that hadn’t been expressed.

So there’s still some debate to be had but again, that upfront honesty is important as it means, once we reach a mutually agreed conclusion to those conversations we should all be singing from the same hymn sheet.

Final thoughts

At a fundamental level I think successful trustee recruitment comes down to two things; firstly, deciding what you really need. A treasurer yes, we all want one of those. But generally do you want someone with fundraising experience, IT or education specialisms – do you really? Because it’s a two way street – bring them in and then expect them to work miracles without resource won’t help anyone – and that certainly applies for the diversification of your board too.

**Or do you really need people who are ‘doers’, leaders but also people able to compromise and who, very crucially I think can properly commit their time.**