



GOVERNANCE: Trustee Recruitment

Getting the right people to sit on your Board and govern your group or organisation is extremely important. There are a lot of things to consider when we come to recruiting new trustees.

Your governing Articles or Constitution will outline key factors which should be understood before you start to look for new Trustees. For example, they will tell you what the minimum and the maximum number of people you can have, how many people can be recruited from your membership and how many you can co-opt for skills, when and how this should be done.

Membership - on the run-up to an Annual General Meeting (AGM) or General Meeting (GM), some Trustees may have reached the end of their term and will need to be replaced. Therefore, this is an ideal time to offer opportunities to join your Board from your membership or users.

Co-opting – this is when you recruit in between an AGM or GM. This is often used to bring skills or knowledge and to fill gaps due to a Trustee leaving. These Trustees will still need to be ‘ratified’ at your next GM or AGM, but again you should check what your governing document states.

Regardless of when you recruit, you should consider several things;

- Skills of your existing Trustees – do you have a good balance of professional skills and practical experience in relation to your field?
- Specific roles you need to fill gaps - are you looking for a new Chair or Treasurer?
- Equalities – are you seeking representation from minorities and those with disabilities and how can you promote this?

To answer some of these questions, the Board should carry out a skills assessment to identify what they are looking for in a candidate. They should consider the essential criteria and set this all out in a recruitment plan. More and more, Boards are setting up Appointments Committees – this is a subgroup of the wider board and will take on all the initial responsibilities of advertising, initial interviewing and making recommendations as appropriate.



Recruitment plan

Your plan should outline;

- The number of Trustees you require
- Skills, knowledge, and experience of each role
- Essential criteria
- Budget for advertising
- Where to advertise (local paper, membership newsletters, social media etc.)
- Who is doing which task and what timescales they are working to

Advertising within the Membership

If you have a membership, you should start here. Your members, whether they are parents, practitioners or office based, will have a variety of skills and ideas that could be beneficial to your work. Your members may have a right to put themselves forward to join your Board and this process should be outlined in your Governing document.

The process explained in the Articles/Constitution can look complicated as part of legal speak text, and it can involve varying timeframes and requirements that might be easier laid out in a simpler format. You may find it a good idea to pull this out into a separate document and simplify the language.

Start by writing to your members asking for nominations for the board. Tell them what is involved and how important it is to get their voices at a strategic level. Highlighting some past achievements and future plans will help get people interested in applying. Be sure to tell people how often you meet, where (online, in person or hybrid) and for how long. Let them know if you cover out-of-pocket expenses such as travel.



Advertising to co-opt skills onto the Board

There are a number of platforms to advertise for specific skills. A good place to start is your local Volunteer Centre. You can often do this online and make it live or halt an advert at any time. Many people looking for volunteering opportunities will use this as a first place to start. You could attract a wide range of people from young people looking to learn new skills to those who have retired and want to continue to use their skills to support good causes. Also you can use Social Media, including LinkedIn. Goodmoves is a voluntary sector recruitment platform and is very effective, but does come at a cost. Sometimes word of mouth can be very effective – your existing Board may know of individuals to approach. Be aware however of any possible conflicts of interest, although this can be easily addressed by keeping a Register of Interests.

We would recommend that recruiting from your membership and co-opting are done at different times to avoid confusion. Put Trustee recruitment as a regular agenda item for meetings. That way you will be able to discuss any emerging needs as they arise.



Smart Play Network Members Support

There may be terms you are unfamiliar with in this information sheet or you would like support with and we are happy to help further. Remember you have access to telephone and email support. Please contact us on 0131 554 2620 or admin@smartplaynetwork.org

Next Steps

So you have lots of people interested! Make sure (again) that you are following any process outlined in your Governing document and then begin the selection process. This should be a step-by-step process for recruiting for membership and could mean voting if you have more applications than you have available spaces. For co-opting, it could involve interviews by the Chair. Setting up an appointments committee will help focus this work to a few people rather than having to get the whole Board involved at early stages.

Example process for membership recruitment

- Advertise for nominations and set a closing date.
- If you have more applications than vacancies, refer to your process in your governing document on voting (ballots) and how this should take place.
- Hold the ballot, this could be done by post, email or in person at a General or Annual General Meeting.
- Announce the new appointments to the wider membership.
- Carry out any legal requirements (e.g. registering at Companies House if a company).
- Begin the Induction Process (detailed in the next Information sheet).
- Arrange for a first meeting to welcome and involve your new Trustee(s).

Example process for co-opting for specific skills

- Advertise stating clearly the skills required.
- Arrange an initial chat with the organisation Lead or Chair.
- If they seem like a good fit, invite them to the next Trustee Meeting to introduce themselves and meet the rest of the Board.
- Ask the potential Trustee to kindly leave early to allow the other Trustees to vote.
- Take a vote on whether to appoint or not.
- Relay the decision to your candidate.
- Announce the new appointments to the wider membership.
- Carry out any legal requirements (e.g. registering at Companies House if a company).
- Begin the Induction Process (detailed in the next Information sheet).
- Arrange for a first meeting to welcome and involve your new Trustee(s).