Pathways through Trusteeship: Responding to the Trustee Recruitment Crisis

Running Head: Recruiting Charity Trustees

Abstract

Getting on Board (2017) suggests that the recruitment of trustees to the Board of Trustees (henceforth volunteer trustees) by charities in the UK is in a state of crisis. This report and a range of other stakeholders offer advice and guidance about recruitment, but attention to what motivates individuals to become trustees is lacking. Drawing upon the Pathways Through Participation framework (Brodie, Hughes, Jochum, Miller, Ockenden and Warburton, 2011), we argue that an important part of addressing the crisis in trustee recruitment is to consider the motivations of volunteer trustees in tandem with their resources and triggers for volunteering. We draw upon a study of fourteen volunteer trustees of learning disability charities to explore how a critical understanding of volunteer trusteeship as a pathway through participation provides a full and rounded picture of trustee recruitment. Building on other research on volunteer recruitment and markets, we argue that recruitment can be improved when charities better understand what motivates their volunteer trustees. We recommend that charities consider trusteeship as a pathway through participation as part of their recruitment practices.

Keywords: Recruitment, Volunteer, Trustees

The recruitment of volunteer trustees to serve on the Board of Trustees is a key challenge for many charities (Getting on Board, 2017; Lee, Harris, Stickland and Pesenti, 2017; Vernon and Stringer, 2012). Getting on Board (2017, pp. 5-6) suggests that the recruitment of charity trustees is in 'crisis'. Moreover, Lee et al (2017, pp. 23-24) highlight concerns about the extent of trustees' full awareness of their legal roles and responsibilities upon recruitment. The serious implications of poor recruitment practices have been underlined by the Institute of Chartered Secretaries and Administrators (ICSA) which suggests that failings in recruitment practices, including recruitment without regard to the charity's governing document may amount to a 'breach of trust' (Preston, 2017). Areas for improvement include the management of recruitment processes, particularly how trustees are recruited. The recruitment of trustees has become an enterprise in itself. High quality advice is available from a range of charitable bodies, for-profit entities and partnerships between stakeholders.[i] However, many charities recruit trustees via existing networks or word of mouth with a very low use of press and brokerage agencies. Charities are encouraged to have a diversity of skills and experiences on their boards (Lee et al., 2017, p. 1; Lamb and Joy, 2018; Seager, 2013). Forty-five per cent of charities reported that they were not proactively engaged in addressing this (Getting on Board, 2017, pp. 5-6). Boards are also under pressure to provide strategic leadership in the development of particular areas; for example, 'digital trustees' to steward charities in the digital age (Thorne, 2018; Amar and Evans, 2018). However, with some exceptions (Lee et al., 2017, pp. 23-28), in the context of these debates and challenges, attention to the question of what motivates individuals to volunteer as trustees of the boards of charities (henceforth trustee volunteers) is lacking.

We argue that an important part of mitigating this 'crisis' in trustee recruitment is to ensure that charities have a full and rounded picture of why and how people become volunteer trustees. Drawing upon the Pathways through Participation framework developed by Brodie, Hughes, Jochum, Miller, Ockenden and Warburton (2011), we explore the recruitment of volunteer trustees with reference to: (i) *motivations*, that is why people volunteer as trustees; (ii) *resources*, what they bring to the position; and, (iii) *triggers*, prompts to engage. We suggest that the recruitment of trustees requires attention to the spectrum of 'conditions that enable service' on boards (Walton, Clerkin, Christensen, Paarlberg, Nesbit and Tschirart, 2017, p. 116). The recruitment and, indeed, the retention of volunteers can be improved when organisations know what motivates their volunteers (Hamerman and Schneider, 2017; Ward and McKillop, 2011, p. 256; Stukas, Worth, Clary and Snyder, 2009; Dolnicar and Randle, 2007; Bussell and Forbes, 2006, p. 248). Inglis and Cleave (2006, p. 84) also argue that recruitment is a first step in improving governance and accountability. Recruiting trustees is salient in a challenging climate for charities marked by austerity, competition for resources and a need to avoid scandals about poor governance that have affected some charities in the sector (Clayton, Donovan and Merchant, 2015; Metcalf, 2013; Macmillan, 2011). We recommend that charities consider trusteeship as a pathway through participation as part of their processes and practices around recruitment. We suggest that the application of this framework could be replicated by boards of charities as part of their internal auditing of skills of existing trustees and that it can and should inform the recruitment of new trustees.

Our focus is on charities that work with and/or for people with learning disabilities. The research findings reported here are part of a wider study of these charitable organisations (Daly, Biddle, Brandon and Slack, 2018). We have situated this paper in the context of debate about recruitment, underpinned by analysis of motivations of individuals who become volunteer trustees. It is also important to note that charities that work with and/or for people with learning disabilities have evolved in an environment where the Disabled People's Movement has contested the disempowering dynamic that has traditionally characterised the relationship between disabled people and charity (Beresford, 2016; Longmore, 2015, p. 204; Oliver, 2013; Barton, 1996). In addition to the broad, general challenges facing charities across the voluntary and community sector, charities that work with and/or for people with learning disabilities are engaged in a cause that is often contested by the charity's stakeholders.

Rooted in a qualitative, interpretive research design, we used semi-structured interviews to explore why and how individuals become volunteer trustees. Though the past study of boards has been criticised for an 'over-reliance' on the viewpoints of members of a board, this approach was pertinent to this present analysis (Cornforth and Edwards 1999, pp. 346-47). We carried out fourteen interviews across six different organisations, with no more than four interviews in a single charity. The research was subject to ethical approval and procedures. Trustees were recruited from a mix of networks of the research team and formal contact with a charity.[ii] Most of the interviewees were men (indeed, Lee et al. (2017, p. 17) also highlighted the predominance of male trustees), and approximately half were either retired or semi-retired. The length of time that they had served on a board varied from no more than

two years (010, 011) to being close to the end of a maximum term of service (001, 006).

All participants received information about the project; gave their formal consent to be interviewed and received a copy of the interview transcript for review. As outlined in Easterby-Smith, Thorpe and Lowe (1991) and drawn upon by Solomon, Solomon, Norton and Joseph (2011) amongst others, the transcripts were reviewed and subject to interpretation in stages. First, they were read by the researchers individually as part of (re)familiarisation and reflection on the study and to begin the (manual) open coding of transcripts. As a team, the themes and concepts that emerged from this exercise were then discussed, refined and formalised into more focused themes that were pertinent to addressing research questions on motivation of trustees. From the themes, indicative quotes were identified. Overall, this staged approach revealed in-depth insights and linkages into the key aspects of trustees' pathways through participation: their motivations; their triggers for volunteering and the ways in which they articulate what they bring to the board.

**Pathways through Participation**

The analysis of why individuals join the boards of charitable organisations (typically referred to as board volunteers or governance volunteers of non-profit organisations) features as part of the literature on the governance of charities or non-profit organisations. Motivations, resources and triggers are considered within the extant literature, though not in a holistic way. An exception is Walton et al's (2017)

consideration of means, motive and opportunity for board volunteering. Cross-sectional rather than qualitative research designs are common to these studies (Cornforth, 2012, p. 1128). Notwithstanding, the Pathways through Participation framework allows us to draw themes together in a way that facilitates the qualitative and coherent explication and analysis of why and how individuals become charity trustees. We outline the core aspects of a pathway through participation here, before then considering what our findings revealed about the motives, triggers and resources of volunteer trustees.

(i)     Motivation

According to Brodie et al (2011, p. 37) motivations encompass 'the meanings people give to their participation'. They also manifest an individual's personality and sense of identity; their values and beliefs and whether or not they believe that their participation has an impact, or rather that it can 'make a difference.' The motivation to volunteer may be intrinsic to the individual, that is, a form of 'self-expression'. Or, it may be 'extrinsically motivated' that is, it may have some 'instrumental value' to the individual (Finkelstien, 2009, p. 654; Wilson, 2012, pp. 179-183). Research on volunteerism rarely suggests that people are motivated to volunteer for a single reason, but rather that multiple motivating factors tend to be in evidence (Walton et al, 2017, p. 120). For example, in relation to boards of non-profit organisations in the United States, Widmer (1985) suggests that no single incentive encapsulates why people volunteer to join a board and in some cases, reasons for joining a board were not the same as reasons for staying on as a board member (ibid., p. 19). Many studies of board member motivation draw upon conceptual frameworks rooted in research designs that allow for

the scaling and ranking of motives and/or incentives for volunteering, and whether the experience lives up to people's expectations (Inglis and Cleave, 2006; Inglis, 1994; Searle, 1989; Walton et al, 2017).

### (ii)   Triggers

An individual's relationships matter as triggers for participation. Relationships with parents, children, partners and friends can inform an individual's motivation to participate. They can also act as a trigger for participation. Brodie et al (2011, p. 43) found that 'being asked' was 'one of the most important triggers to participation.' An individual's social network can be influential too. It can have an impact on the type of role an individual assumes in an organisation, particularly as an ability to give an organisation access to an individual's wider network may be useful in particular positions. An individual may also choose to volunteer when presented with an *opportunity* to do so (Verba, Schlozman and Brady, 1995; Pattie, Seyd and Whiteley, 2003; see also Walton et al, 2017, pp. 128-129).  They may be more likely to volunteer when someone they hold in esteem makes the request (Okun and Eisenberg 1992). Cornforth and Edwards (1998), Iecovich (2005) and Lee et al. (2017, p. 23) identified the salience of informal personal networks to the recruitment of board members.

### (iii)   Resources

Resources are about the 'enabling factors which allow an individual to participate' (Brodie et al, 2011, p. 39). These resources may be practical, learnt or felt. Practical resources encompass whether an individual has money, the time to give, is in good

health and the accessibility of transport networks. Learnt resources are about the skills, knowledge and experience an individual possesses. Some may see the absence of particular skills as a barrier to participation (Wilson, 2012, pp. 183-188). Others may see voluntary participation as an opportunity to apply skills, knowledge and experience obtained in other parts of their lives, such as the world of work, to other areas.  Felt resources are about the individual's confidence and 'sense of efficacy.' The study of means is also about the resources or assets, that is, the 'markers of human capital' that facilitate an individual's volunteering (Walton et al, 2017, p. 118).

As a pathway through participation, motivations, resources and triggers are mutually reinforcing rather than discrete aspects of voluntary participation. Personal motivations, which tend to be multi-faceted than singular provide the potential for an individual to participate. However, it is normally the trigger that enables the process of an individual giving consideration to participation to begin. Whether or not an individual chooses to participate will be affected by their possession of, and access to resources (Brodie et al, 2011, p.  49). This provides for a holistic appreciation of why and how people participate, and of their resources, which we will explore in relation to volunteer trustees of charities that work with and/or for people with learning disabilities.

**Motivations, Resources, Triggers: Trustees of Learning Disability Charities**

When asked why they volunteered as a trustee, many interviewees began by telling the story of how they became a trustee before reflecting further on why they said yes to the role. In all but one instance, the 'trigger' that prompted an individual to volunteer

as a board member was being asked to do so. Typically, the opportunity to volunteer as a member of the board of a charity arose due to links formed with the organisation in a professional capacity, which meant that many of the trustees came to the role with an in-depth knowledge and understanding of the organisation. Personal connection with the organisation, for instance as a user of its services or through friendship with an existing member of the board were significant too. All of the trustees spoke of how their organisations had sought to formalise their recruitment processes in recent years. Nonetheless, the informal recruitment of trustees, typically by the chief executive or the members of the board remains salient. For instance:

"I tried to slide quietly off, but [name of person] who's Chief Exec of the charity didn't allow me to do so. She said 'you're not going anywhere, you're going to join our Trustees.' So, I agreed to join the Trustees. Partly because I had an association with them anyway, and partly because my background and experience is all to do with special needs" (009).

This quotation exemplifies the informality of how trustees are recruited and how this practice may serve to restrict opportunities to diversify the board. However, when the trigger to volunteer is considered alongside the personal motivations for why individuals chose to take up the trustee position, a range of multifaceted factors are also revealed.

For just under half of the participants, the motivation to become a trustee of a learning disability charity was rooted in the experience of living with a disability, or having a family member with a disability and/or being a disability activist. This manifested in a variety of ways. For example, the desire to have an impact was a strong impetus, often

rooted in a desire and acknowledgement that one could bring one's experience to the board:

"I just wanted to be on the board and contribute to the board so that people could, how can I say, see disability from a different point of view …" (003).

An identification with having a personality that is predisposed to trusteeship may be combined with an understanding and/or experience of learning disability. One interviewee spoke about being from a family with a propensity towards civic involvement and how his/her involvement with the charity had come about through his/her attendance at meetings where s/he became recognised as someone who was not afraid to speak their mind:  "I am the sort of person who occasionally gets up on [his/her]  hind legs and says things when I get cheesed off" (012). The only interviewee in the study who had sought out an advertisement for a position of trustee and had no former connection with the organisation described how s/he was drawn to the organisation because of the experiences of a family member with a learning disability. This had been an important part of where s/he chose to volunteer:

"I wanted to be a trustee but I also wanted to have an affiliation with whatever I went to apply to" (011).


A personal motivation to volunteer may be bound up in one's sense of identity and values, which may dovetail with one's professional development and career path too:

"Why did I decide to become a trustee … well I suppose it was a little bit of nature and nurture. You don't just decide to become a trustee, you sort of grow into it. At least that's my experience. Whether it comes from a sense of community where I was born

and brought up, a sense of values and this sort of thing. When I went to university, I did stuff in the community. Always have done. Then I started working for [name of company] [which was] very big in the community" (001).

Similarly, a participant with a professional background in social justice articulated his/her motivation in a way that it is possible to discern how one's beliefs, values, identity and desire for change combine. S/he spoke about being motivated by a disabled person being treated unfairly in the workplace early in his/her career and personal factors too:

''I'm dyslexic … [s]o there was a general interest and when I did go to [name of charity] what kept me there … is that it's not just about a particular disability, it's about disabilities across the board" (002).


For many trustees, their involvement with a charity in a professional capacity also appeared to inform and shape their values and beliefs, specifically their passion and commitment to the charity's activities, principles and mission. Becoming a trustee was presented as a 'natural' route for two individuals who had worked with disabled people and found themselves with time on their hands upon retirement (013, 010). Motivation, resources, and trigger can align, sometimes fortuitously rather than in a more strategic sense:

"I saw the great work that X [name of charity) were doing … And I thought well it would be wonderful to get involved at some stage if I can in more depth. In addition, I was made aware of the role by my then [employer], who was Chair of X [name of charity].

And also, I'd never been on a board before and that was something I definitely wanted to do in terms of developing my own self professionally and personally" (008).

A mix of learnt and felt resources were in evidence, with some hint of practical resources as relevant (for example, time). When resources are considered alongside motivations, the distinctions between the types of resources is not always clear-cut. On the one hand, a sense that the resources an individual brings to the board are felt is evident in the passion and commitment of interviewees, which is often very personal and aligned with wanting to make a difference:

"[I] got involved basically because my [name of relation] have needs which I can provide, which the local authority is supposed to provide in theory. And as soon as you realise it's not just you [that] [t]here are other people who don't have [someone] like me and as soon as they get older don't have [anyone] at all and they need someone on their side" (012).

The opportunity to apply and transfer their learnt resources and to have an impact on the organisation in this way was mentioned by the majority of trustees who came to the organisation because of their professional expertise.  For these individuals, the opportunity to apply their resources is also rooted in empathy, confidence and sense of efficacy that are intrinsic to felt resources. Take this interviewee, for instance, though s/he spoke of a desire to 'put something back' as a motivation for volunteering, s/he was also quite strategic in thinking about where they might volunteer, taking particular account of where they were likely to have an impact:

"I like the challenging and complex because that's my skill-set, therefore I find that stimulating and interesting. Anything that's too straightforward wouldn't appeal to me. I've been involved in lots of smaller organisations, charities and fundraising and things and I'm happy to support them in many ways, but I like getting involved in a complex organisation, where I feel my skills are useful"(004).

When considered as a pathway through participation, the recruitment of trustees is a process and dynamic of the mutually reinforcing factors of motivation, resources and triggers. It is often difficult to disentangle one from the other and our findings illustrate how all three coalesce to inform and shape the recruitment of volunteer trustees. As a dynamic process, it is also a rather messy one. The strategic implications of looking at recruitment as a pathway through participation are now discussed.

**Discussion and Conclusion**

The paper makes a case for the study of the motivations of trustee volunteers to be a part of the recruitment of trustees. It suggests that recruitment is a dynamic process that is best understood as a pathway through participation, rather than a passive organisation or recruiter-applicant relationship. Skills audits allow charities to take a broad and full assessment of their boards and to identify gaps across the spectrum of skills, knowledge and personal and professional experience.[iii] If charities were also to consider their trustees' pathway through participation to encourage reflection amongst the existing body of trustees, the audit could be underpinned by in-depth insight into

the intrinsic and extrinsic motivations that lead trustees to either seek out, or say yes to, an opportunity to become a trustee volunteer. Our focus on learning disability charities is revealing of how a sense of personal loyalty to, identification with and/or experience of a cause underpins a decision to become a trustee volunteer and the resources an individual believes that he/she brings to the board. As previous research noted at the outset of the paper suggests, and as the findings from our study demonstrate, this has the potential to enrich the recruitment of, and arguably better secure the retention of, volunteer trustees. It can give charities a critical understanding of their potential 'volunteer market' and they can tailor their recruitment efforts and campaigns accordingly (Hamerman and Schneider, 2017, p. 7; Bussell and Forbes, 2002). Indeed, Lee et al. (2017, p. 23) also highlighted the importance of 'personal interest' as a key factor in trustee motivation and the personal importance of the role to the individual.

Although the resources an individual is perceived to possess, significantly often by others, such as a chief executive, tend to trigger the opportunity to volunteer as a trustee, our study shows how this is underpinned by multi-faceted personal motivations. Moreover, these are significant in prompting an individual to say 'yes' to a volunteer trustee opportunity. Getting on Board (2017) found that some people, particularly women and people from Black and Minority Ethnic (BME) Communities tend to wait for the 'right' time to volunteer as a trustee. Having a board that is made up of individuals who are  able to articulate the full story of why and how they became trustees alongside the skills they bring to the board has the potential to reduce the 'social risk' individuals associate with putting themselves forward as a volunteer (Riecken, Babukas and Yavas, 1994; Bradshaw, 2002). This may be important to

demystifying trusteeship and allow individuals to pinpoint a variety of pathways through participation, including, for example, the mutually reinforcing dynamic of informal and formal volunteering (Lee and Brudney, 2012).

The closed nature of trustee recruitment practices by charities is often criticised (Getting on Board, 2017, p. 5-6). In addition to concerns that it leads to "groupthink", it is also linked with boards that are lacking in diversity (ibid). Moreover, for disabled people it has the potential to reinforce concerns raised by disability activists about charity; that disabled people are talked about or at, sometimes in demeaning and/or offensive ways, but their voices are not heard (Daly et al., 2018; Beresford, 2016; Longmore, 2015, pp. 187-199). We agree that diverse boards are likely to be more effective boards and research on board composition should continue to advance our knowledge and understanding of this (for example, Lamb and Joy, 2018; Callen, Klein and Tinkelman, 2010). There is also a need to further explore the role of chief executives and members of the board in recruitment and their rationales for approaching individuals to become volunteer trustees. Both implicit and explicit amongst our participants was a sense that they were approached because they were likely to do a good job, based on their past professional record or involvement with the organisation. There are fundamental questions for further research to address about the extent to which this practice is a way to manage risk to the charity, but at the expense of opening it up to new perspectives and opportunities that may help it to challenge and not just navigate the prevalent environment.

In conclusion, we argue that the articulation of volunteer trustee recruitment as a pathway through participation reveals how the consideration of motivations, trigger(s)

and resources in tandem provides a full and critical understanding of the recruitment process. It reveals how people do not only bring skills and/or empathy and experiences to the board per se. Rather, these are rooted in personal events, personalities, life experiences and desires to make change happen. Charities face pressing governance challenges (Metcalf 2013). Effective recruitment processes and practices will help to address these head on. In this respect, an informed view of why and how individuals become trustees as a pathway through participation is salient.

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[i] See http://www.smallcharities.org.uk/resources-trustee-positions for a full list.

[ii] In the case of the former, where this occurred, another member of the research team carried out the interview. Once formal contact with the charity was established, we also asked forthcoming participants for further contacts regarding potential interviewees.

[iii] https://reachvolunteering.org.uk/guide/how-complete-skills-audit