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## AIM Guides for Boards

# Planning to recruit a manager

Author: Alex Lindley

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### Introduction

This guidance note is intended to help trustees of museums and heritage organisations with planning to recruit a manager or member of staff for their organisation. It focuses on the stages of recruitment that take place before you even advertise, as well as outlining where you can find more information to help with running the recruitment campaign itself.

Whether this is your first paid employee or the latest of many, effective planning at the early stages is the foundation of a strong recruitment campaign and successful employment relationship with your chosen candidate.

This ensures your organisation is clear about the purpose of the job and how it will fit in, as well as making sure you have considered how to manage, motivate and retain the successful candidate once you've found them.

**This note outlines good practice, provides advice and has links to other sources of support you may find useful. Where further sources of support are signposted, these are underlined in the text and links are given in the Further Guidance section at the end.**

## Who does what?

Before you start planning your recruitment process, it is important that everyone is clear how it will be managed and who will be responsible for different parts of the work. Often, the most efficient approach is for the board to delegate the detailed planning and management of the recruitment process to a sub-committee or working group.

However, the whole board should be involved in considering the strategic aspects of recruitment, such as the purpose of the role and how the job holder will work with the board – and vice versa! – to ensure everyone is committed to developing a role that works for your organisation and good working relationships with the new employee.

## Job design

Regardless of whether you are employing someone for the first time – on a permanent or temporary basis – or want to fill an established role in your organisation, it is important to ensure that the job is designed to meet the needs of your organisation. These needs, of course, may alter over time as your organisation changes, so it is good practice to review established roles whenever you are looking to fill a vacancy.

Job design starts with gathering information about the job, such as its content, purpose and desired outputs. This information can then form the basis of the job description and person specification. You can gather this information in a range of ways, including discussing the role as a board, seeking input from existing employees, volunteers and other stakeholders (e.g. funders for project posts),

or finding other museums or heritage organisations with similar roles and asking them to share their job descriptions with you.

The checklist below includes key factors to consider when designing a job to meet the needs of your organisation. You can work through it and tick each one when you've discussed it as a board or sub-group.



### Top tip

Don't assume the title of the job automatically communicates what you want. It is always better to start with the tasks, roles, responsibilities and outcomes you want – then create a job title to match.

Factors	Discussed & agreed
What is the purpose of this job? Why does your organisation need it?	<input type="checkbox"/>
What is the nature, range and volume of tasks to be undertaken by the job holder?	<input type="checkbox"/>
What are the key things that the job holder will deliver? How will you know/measure that the job is being done properly?	<input type="checkbox"/>

*Continued overleaf*

Factors	Discussed & agreed
<p>Will the job holder be responsible for managing others (e.g. employees or volunteers)?</p> <p><i>Remember, this takes time to do well, so needs factoring in to make sure there is a balance of time for management and completion of other tasks.</i></p>	<input type="checkbox"/>
<p>How many days a week will the job holder need to work to complete the tasks? Are there any particular days they will need to be onsite (e.g. for Front of House service, events)?</p>	<input type="checkbox"/>
<p>To what extent can your organisation accommodate flexible working arrangements for this role (e.g. some home working, job share, flexible hours)? How will this impact on the tasks they need to do (e.g. managing volunteers)?</p> <p><i>Whilst you may need the job holder to be onsite for a proportion of their time, being open to flexible working arrangements will encourage a greater range of applicants to apply.</i></p>	<input type="checkbox"/>
<p>What is a fair level of reward for this job?</p> <p><i>You can use the <a href="#">Museums Association salary guidelines</a> and similar jobs advertised at other museums and heritage organisations to benchmark. You'll also need to check that the salary equates to or is higher than the <a href="#">National Living Wage</a> hourly rate:</i></p> <p><i>(Annual salary ÷ 52) ÷ Number of hours worked per week = Hourly rate</i></p> <p><i>Remember to consider other aspects of reward too, such as <a href="#">holiday</a>, overtime and pension, some of which have minimum entitlements, governed by employment legislation. For example, if you employ at least one person, you have a legal duty to provide a <a href="#">workplace pension</a> for them, if they meet the relevant age and earnings criteria.</i></p>	<input type="checkbox"/>
<p>Does your organisation have <a href="#">payroll arrangements</a> in place to pay the job holder?</p>	<input type="checkbox"/>
<p>Will this job be offered as a permanent or fixed term position? Does your organisation have a <a href="#">contract of employment</a> to cover this?</p> <p><i>Fixed term contracts are good for project posts with clear end-dates or for roles financed by short-term funding arrangements. Generally, those on <a href="#">fixed term contracts</a> have similar employment rights to permanent employees, including rights to statutory redundancy pay at the end of a contract if the employee has more than two years' service, so ensure you are clear on what needs to go into the contract and your responsibilities as an employer.</i></p>	<input type="checkbox"/>
<p>Does your organisation have basic <a href="#">employment policies</a> in place to ensure you can manage the job holder effectively?</p> <p><i>The following policies are needed to ensure you fulfil your obligations as an employer: <a href="#">Health and Safety</a>, Safeguarding (if applicable), Grievance and Disciplinary, Sickness Absence, Conflict of Interest, Equality and Diversity.</i></p>	<input type="checkbox"/>

## The impact of the job on the organisation

A new role in any organisation inevitably brings changes of one kind or another. It may be that existing responsibilities are shared out differently and/or that new ways of working are needed to accommodate the new role. To manage these changes effectively, your board or sub-group needs to consider in advance both how the role will fit into the organisation and how you will set expectations of the role and job holder.

### **Fitting in**

The question of how a new job fits into your organisation more widely really boils down to whether you will need to change how you do anything in your organisation at the moment in order to accommodate the job. Questions to ask include:

- How will the job holder work with the board (e.g. presentation of reports, attendance at meetings, participation in setting strategy and plans)?
- How will the job holder work with others (e.g. employees and volunteers)? Are any changes to how work is organised for existing employees and/or volunteers needed (e.g. rotas, meetings) to help the job holder work effectively?
- Is the job holder taking on any tasks that other people currently do? If so, plans for handing over responsibility may be needed.
- How will any changes in responsibility affect existing employees or volunteers? Those handing over parts of their current responsibilities to a new employee could feel displaced or undervalued – especially if the work was something that they particularly enjoyed. What can you do to ensure they continue to feel valued and motivated?
- Will the job holder be expected to do things any differently to how they are done currently? If so, will this require any changes in your current policies and practices? For example, if the job holder takes over the role of authorising invoice payments

which has previously been done by your Treasurer, your Financial Regulations and arrangements with your bank may need to be reviewed to ensure they have delegated authority to sign off payments.



### **Top tip**

One of the most important questions to look at is how the job holder will be managed. Who will set their objectives, provide support and monitor their performance? If the person you are recruiting is the most senior employee, the Chair or a nominated trustee should act as manager, holding regular 1:1s and appraisals. In a small organisation, the job holder may also value additional pastoral or job-related support. This could be provided by another trustee or you could encourage the job holder to seek a mentor or buddy from another museum or heritage organisation, either informally or via local networks and/or regional museum support organisations.

### **Setting expectations**

It can be easy to pin your hopes for your organisation on a new employee, particularly a managerial role in a small or medium sized organisation. Perhaps this fabulously efficient person will be able to transform your operation and pick up all those things that there isn't time for at the moment... Whilst that may indeed be the case (I hope so!), your board or sub-group should explore what it is reasonable to expect from any employee, as opposed to a volunteer or trustee.

Operationally, there are obvious benefits of having a well-defined role which is manageable within the job holder's working week. After all, a sense of being in control and achieving objectives is

vital for maintaining the job holder's motivation and promoting a positive work-life balance; whilst a clear delineation of roles is important for building a cohesive team where everyone understands their job and no-one treads on anyone else's toes!

Practically, there are also a number of reasons for your board to have a shared set of expectations about the role:

- **The risks of unreasonable expectations:**  
Most contracts and job descriptions include a flexibility clause, so that employees can occasionally be asked to undertake other tasks not specifically stated in their job description. However, if an employee is regularly being asked to 'pick up' things that your organisation needs doing – but which are a long way outside their job description – this could lead to claims of constructive dismissal or breach of contract.
- **The risks of ambiguously defined roles:**  
If there is too much similarity between an employee and volunteer role in your organisation (e.g. in terms of the nature of the tasks and/or level of responsibility), this may risk creating an implied contract for a volunteer, which could result in them making a claim of worker or employee status – and therefore worker or employee rights, such as salary.

- **The need to comply with the Working Time Directive:** This legislation limits the maximum number of hours someone can work per week. So, for example, whilst employees can reasonably be expected to take on greater levels of responsibility than volunteers or trustees, they should not necessarily be expected to be as flexible in their hours as some volunteers can be.



### Top tip

In small organisations, trustees can sometimes wear more than one 'hat', taking on responsibilities as operational volunteers as well as trustees. Where this is the case, trustees should avoid outranking behaviour or decision making when they are in their volunteer roles, as this can put an employee with volunteer management responsibilities in a difficult position. Trustees need to take responsibility for wearing the right 'hat' at the right time, so that the employee can manage all volunteers equally.

## Engagement

Before you recruit a new employee, you should also be thinking about how to keep them once they've joined your organisation. There is a substantial body of research into what makes people stay in their jobs and what drives them to feel engaged and committed to their organisation. 'Hygiene factors' such as sufficient salary and a safe working environment are, of course, part of this.

However, other factors, relating to our 'higher order' needs as humans are those which really drive engagement. This diagram outlines 6 key areas to consider when designing a new role or reviewing an existing role, to ensure it is structured to help motivate and retain the job holder. For each area, be clear about how you're going to make it happen: what things will you and others in your organisation do to make these things a reality?





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## Equality and Diversity

Recruiting a new employee is an ideal opportunity for your board to take a broad approach to equality and diversity in your organisation. As cultural bodies, museums and other heritage organisations can enrich the work they do by welcoming job applicants and employees with a wide and diverse range of backgrounds and experiences. Not only that, but a more diverse workforce can help to address other challenges museums and heritage organisations face, such as audience development, public engagement and collections development. Furthermore, under the Equality Act 2010 all employers have legal responsibilities throughout the recruitment process and during employment, to ensure that job applicants and employees are treated equally.

When putting together your role description and person specification, think carefully about what qualifications and experience are really needed to do the job. Being open to considering different life and professional experience could increase the number of applications you receive and bring fresh thinking into your organisation. For example, those with experience outside the sector, but in a related field such as hospitality or leisure could have the skills and knowledge to run a small or medium sized museum or heritage operation – sometimes maybe more so than someone with experience in a large national museum whose previous roles have been more specialised. Furthermore, those without degree level qualifications may bring equivalent practical experience that would be more relevant to your organisation's needs.

### Top tip

#### Get the legal stuff right by:

- Asking applicants to let you know about any **reasonable adjustments** they might need, to ensure that anyone with a disability, physical or mental health condition can participate equally in the interview and selection process (e.g. providing materials in large print for people with visual impairments).
- Being open to exploring changes to working practices, working environment or equipment with candidates or new employees, to enable someone with a disability, physical or mental health condition to undertake the role.
- Having a clear approach to the **recruitment of ex-offenders**.
- Make sure you're clear what you can and can't ask on application forms and in interviews, to avoid **discriminatory questions**.

## Job description and person specification

Writing job descriptions and person specifications involves a fine balance:

- Too detailed and you risk making the job seem impossible and the sort of person you want, some kind of super-human...
- Too vague and you could get overwhelmed with applications from unsuitable candidates, or your chosen candidate might leave when they find out that the realities of the job are different from their expectations.

The table below outlines key points to include in the job description and person specification. The person specification should be directly related to the job description, as the experience and skills needed should stem directly from the core responsibilities and aims of the role.

Job description	Person description
<p><b>1. Job title</b></p> <p><b>2. Brief overview of the organisation and its purpose</b></p> <p><b>3. Summary of the main aims of the job:</b> <i>In 3 or 4 sentences, how would you describe this job to someone who knows nothing about it? What are the main things you want the job holder to deliver?</i></p> <p><b>4. Core responsibilities of the job:</b> <i>This is usually a series of bullet points which comprise a detailed description of what the job holder will be doing. For example, "You will oversee the marketing and communications strategy, measuring and monitoring progress against the plan." It can be helpful to split the responsibilities out into the main areas of the job, such as Strategic planning, Leadership and management, Finance and income generation, Marketing, Collections/facilities/property management. It can also include specific responsibilities or one-off projects, such as leading the delivery of a new CRM system or digitisation of the collection.</i></p> <p><b>5. Scope and scale of the role, including:</b></p> <ul style="list-style-type: none"> <li>- Contract type (full-time/part-time, temporary/permanent)</li> <li>- Who the job holder reports to</li> <li>- Line management responsibilities</li> <li>- Level of budgetary responsibility</li> <li>- Working hours</li> <li>- Key relationships</li> <li>- Reward information (salary range, pension, holiday, other benefits)</li> </ul>	<p><b>1. Outline of experience and knowledge required for the job:</b> <i>These can be separated into Essential and Desirable categories to encourage a broader range of applicants and help you determine which are of primary importance. If you do this, 5 of each (Essential and Desirable) should be enough to capture the key requirements for any role. If you have more, challenge your board to think more critically about the real priorities.</i></p> <ul style="list-style-type: none"> <li>• <b>Qualifications needed</b></li> <li>• <b>Previous experience required in particular fields (e.g. managing budgets, exhibition design, capital projects):</b> <i>Be careful here, as if you request a particular number of years' experience, this could be discriminatory on the grounds of age. Instead, think about using terms such as 'basic' or 'substantial' experience to outline the level you're looking for.</i></li> </ul> <p><b>2. Outline of key skills and attributes needed for the job (again 5 – 8 should be plenty):</b> <i>Examples might include specifics such as written and verbal communication skills, or broader characteristics needed to fit in with your organisation, such as an outcomes focused approach, or willingness roll your sleeves up and get involved in all aspects of the operation.</i></p> <p><b>3. Any other requirements for the role</b> (e.g. DBS certificate, First Aid qualification, professional membership/qualification)</p>

## Next steps

Once you've completed your planning, you're ready to start your recruitment campaign. This will involve writing your advertisement and job information pack; choosing where to advertise and for how long; sorting applications, interviews, pre-employment checks and induction. Whilst there are many sources of information available online to help with each of these steps, the ACAS guides on [Recruiting Staff](#) and [Starting Staff \(induction\)](#) make a good 'two stop shop' covering the whole process from start to finish. Whilst they are not specific to the heritage sector, they cover all stages of recruitment and induction, providing practical advice and highlighting any areas of employment law or key requirements you need to be aware of at each stage of the campaign and induction process.

In the meantime, time spent getting ready to recruit is never wasted. Not only will it mean getting a better person for the job, it will also result in a more fulfilling employment relationship – both for the job holder and for your organisation.

### About the author:

Alex Lindley is an independent advisor to museum and heritage organisations, specialising in governance, organisational development, human resource management, training and leadership development. [www.alchemyconsulting.co.uk](http://www.alchemyconsulting.co.uk)

### Association of Independent Museums (AIM)

Aim postal  
PO BOX 181  
Ludlow, SY8 9DR  
[www.aim-museums.co.uk](http://www.aim-museums.co.uk)

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## Further Guidance

### Museums Association salary guidelines:

<https://www.museumsassociation.org/download?id=1224909>

### Holiday entitlement:

<https://www.gov.uk/holiday-entitlement-rights>

### Workplace pension information:

<https://www.gov.uk/workplace-pensions-employers>

### National Living Wage:

<https://www.gov.uk/national-minimum-wage-rates>

### Payroll information:

<https://www.gov.uk/pay-for-employers>

### Types of employment contract:

<https://www.gov.uk/contract-types-and-employer-responsibilities>

### Fixed term contracts and employer responsibilities:

<https://www.gov.uk/fixed-term-contracts>

### Step by step guide to a new employee's contract:

<http://www.acas.org.uk/index.aspx?articleid=4209>

### Employment policies and practices:

<http://www.acas.org.uk>

### Health and safety at work:

<http://www.hse.gov.uk/>

### Volunteers and the Law, (2005),

### Mark Restall, Volunteering England:

<https://plantnetwork.org/wordpress/wp-content/uploads/9122/volunteers-and-the-law.pdf>

### Working Time Directive:

<https://www.gov.uk/maximum-weekly-working-hours>

### Reasonable adjustments:

<https://www.gov.uk/reasonable-adjustments-for-disabled-workers>

### Recruitment of ex-offenders:

<https://www.gov.uk/government/publications/dbs-sample-policy-on-the-recruitment-of-ex-offenders>

### Avoiding illegal or inappropriate interview questions:

<https://knowhownonprofit.org/how-to/how-to-avoid-illegal-or-inappropriate-interview-questions>

### ACAS Recruiting staff guide:

<http://www.acas.org.uk/media/pdf/m/j/Recruiting-staff.pdf>

### ACAS Starting staff: induction guide:

[http://m.acas.org.uk/media/pdf/r/b/Starting\\_staff\\_-\\_induction\\_Nov.pdf](http://m.acas.org.uk/media/pdf/r/b/Starting_staff_-_induction_Nov.pdf)