



Equal, Valued and Sustained

Recruitment and succession planning for
Carer Representation: a practical guide

June 2025

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Introduction

The Coalition of Carers in Scotland (COCIS) provides support to the Carers Collaborative, a network of Carer Representatives on Integrated Joint Boards (IJBs) across Scotland. Since 2017, the Carers Collaborative has produced five Equal, Expert and Valued (EEV) reports¹ which outline the experiences of Carer Rep involvement on IJBs and provide good practice recommendations. Many of these recommendations relate to recruitment and succession planning for Carer Reps on IJBs.



The Equal, Expert and Valued reports show that, whilst approaches to recruitment and succession planning have been improving in some IJB areas, there is a lack of consistency across Scotland and a number of key challenges and barriers remain.

This new guide aims to address these challenges by providing a clear route map of actions that can be taken by IJBs at each stage of the recruitment and succession planning process. It includes illustrative examples of good practice as well as a range of supportive resources to improve the consistent implementation of recruitment and succession planning practices in IJBs across Scotland.

Policy context

The Public Bodies (Joint Working) (Scotland) Act 2014² sets out the requirement for Integration Authorities to include carer and lived experience representatives on their Integration Joint Boards (IJBs). Since 2014, other legislative developments have extended the expectation of engagement with carers within Health and Social Care, including, Carers (Scotland) Act 2016³; Care Reform (Scotland) Bill⁴.

¹ <https://www.carersnet.org/carers-collaborative/>

² <https://www.legislation.gov.uk/asp/2014/9/contents/enacted>

³ <https://www.legislation.gov.uk/asp/2016/9/contents/enacted>




⁴ <https://www.parliament.scot/bills-and-laws/bills/s6/care-reform-scotland-bill>

Recruitment and succession planning: The current picture

There are currently Carer Rep vacancies in five IJB areas. A notable improvement from 2024, when 12 vacancies existed. A survey of Carer Reps was undertaken in April 2025 to better understand current recruitment and succession planning practices. 24 Carers Reps (or former Reps who have recently stepped down) from 19 IJB areas responded to the survey. Overall, survey feedback indicates recruitment and succession practices have been improving over the last year.



Length of involvement as a Carer Representative

Time	No. of Carer Reps
Less than 3 years	4 Carer Reps 
3 – 6 years	8 Carer Reps 
More than 6 years	12 Carer Reps 

Experience of induction

Half of Carer Reps (50%) felt their induction into the role was poor; 18% average; 23% good. Only 9% rated their induction as excellent. Responses show that Carer Reps who have been recently appointed were more likely to have positive experiences of induction.

“Had to chase for at least a year to get any form of induction.”

“Buddy in place and easy access to support when needed. Very comprehensive induction pack.”

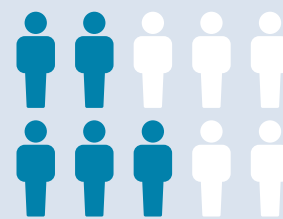
“It was lockdown so no visits and online meetings only. I felt isolated and overwhelmed.”

“Lots of promises, talking the talk, but not walking the walk.”

“Mentored by previous rep for approx. 4 months. I attended all relevant meetings with her so I could fully understand IJB and SPG procedures.”

“A programme was devised but large elements of it were never delivered, despite requests.”

50%



of current Carer Reps felt their induction into the role was poor

48%



of current Carer Reps are either considering standing down or actively seeking to retire

Experience of succession

52% of Carer Reps are not currently seeking to step down from their role; 26% are considering standing down; and 22% are actively seeking to retire from the IJB. Those who are actively seeking to step down were asked the reason why with the following illustrative comments received:

“I stood down last year as I felt highly anxious about my responsibilities and felt overwhelmed by the impending budget catastrophe and cuts to services. I was still overwhelmed by the length and complexity of the papers each meeting demanded.”

“Lack of carers forum.”

“I stayed on the Board with 6 months’ notice to find a successor and helped with that process. When we failed to recruit I still carried out my wish to retire from the Board as timetabled.”

“I was planning to step down just before Covid, but I decided to stay on and help out as best as I could. My caring responsibilities are increasing, and I feel I’ve been in the post too long now.”

Diversity of carer involvement

Only 12% of survey respondents felt there was a diverse range of carers involved in planning in their area*; 42% felt there was some diversity; and 46% felt there was little diversity and poor representation from different parts of the community. (*Diversity related to carers with different caring roles, as well as representation from different sections of the community.)

To better understand the diversity of caring roles Carer Reps were also asked about the condition of the person they care/d for. Responses showed that caring roles related to supporting family members (adults and children/young adults) with a broad range of physical and mental health conditions.

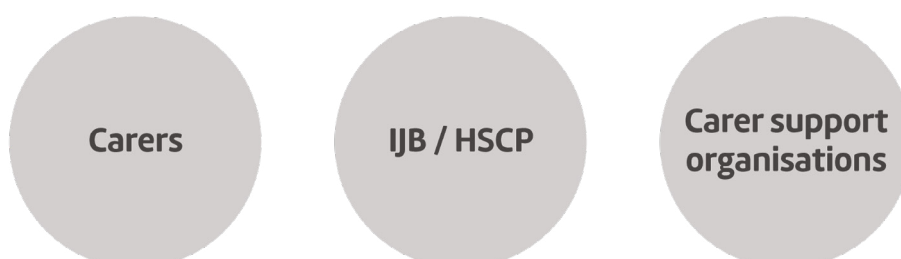
Being a Carer Rep on the IJB takes a significant commitment of time. This makes it difficult for carers who have work commitments (as well as their caring commitments) to get involved. The timings and demands of IJB (and other strategic groups) meetings also play a part in this challenge. Survey responses showed that the vast majority of Carer Reps (88%) are not in employment. Only 8% of Carer Reps work full-time and 4% work part-time.

Recruitment and succession planning: The stages

The recruitment and succession process for Carer Reps can be broken down into five key stages:



Involvement at each stage of the process from:



Each stage needs focused and sustained attention, action and resources. Involvement in the process at each stage is required from:

Carers

Carer Reps and carers should be central to the development and implementation of recruitment and succession planning processes and materials.



IJB / HSCP

Links between the IJB/HSCP, carer support organisations and carers can significantly improve recruitment and succession. These connections help consistency of information sharing between the IJB and carer networks, as well as building relationships between carers and HSCP / IJB officials. HSCPs should also provide resourcing for carer support organisations to enable strong carer networks to be developed and supported.



Carer support organisations

In most areas Carers Centres offer support to carers and carer networks. This includes capacity building support and training; support to understand IJB structures and processes; as well as supporting Carer Reps to link with carer networks. The level of support that can be provided is dependent on resources and capacity of the Carers Centre.



More detail on each stage of the process is provided on the following pages.

1

Stage one: Capacity building



WHY this is important:

Capacity building is the critical first step to supporting carer involvement in IJB structures and processes. The importance of this stage cannot be overstated, as without capacity building, recruitment and succession will be significantly more challenging.

WHAT is involved

Capacity building in the context of recruitment and succession is two-fold:

- 1. Building the capacity of carers:** providing training; information sharing; involvement opportunities for carers.
- 2. Building the capacity of carer networks:** increasing the number and diversity of carers who are involved in local areas.



“We need to think about the carer journey towards the Carer Rep role. If we don’t have that journey then we won’t get true representation. To me it should be mandated to have carers forums in every area to organically grow people’s confidence, skills, expertise and networking. If you get people involved at the grassroots, they start networking and creating relationships with other carers, with Carers Centre staff, with HSCP staff. They gain confidence and skills to move that next step up, like onto the SPG and then the IJB. That’s the cornerstone of what Carer Reps need in terms of networking, relationships and trust.”

– Carer Rep

HOW to improve capacity building

1. Ensure support and training for carers

Becoming involved as a Carer Rep on an IJB can feel daunting. IJB structures and processes are complex, and at times opaque, and the Carer Rep role itself is significant. This is not a role carers can simply 'jump into'. Capacity building needs to be prioritised to ensure carers feel ready to take on what is a significant commitment. This includes:

- **Training on IJB structures, decision making processes, key personnel:** this is critical to building an understanding of the key areas of involvement.
- **A stepped approach to involvement:** having different levels of involvement (e.g. with carers initially engaging in less intensive or formal groups) allows carers to gain knowledge, skills and confidence to take on more formal roles.

2. Build strong Carer Networks

These networks bring carers together on a regular basis and are often supported by Carers Centres. Local networks typically include Carers Forums or Carers Voice groups and can also extend to wider groups (e.g. for those with specific caring roles or sections of the community; locality planning groups). This network is vital to increasing the number and diversity of carers who may wish to become involved. This involves:

- **Strengthening carer forums / groups:** these groups play a key role in developing a stepped approach to engagement and support carer capacity building.
- **Supporting local carer organisations :** carer support organisations (e.g. Carers Centres) typically provide support to the development and strengthening of these networks, and in some areas HSCP personnel (e.g. Carer Lead) are involved. A strong and diverse carer network brings a range of benefits to both carers and the IJB.

Good practice and resources

Carer Representative training

This two-part training course has been developed by Falkirk HSCP and Falkirk & Clackmannanshire Carers Centre. It explores carers rights; self-advocacy, assertiveness and negotiation skills; an introduction to the HSCP; opportunities for involvement in HSCP meetings/structures.

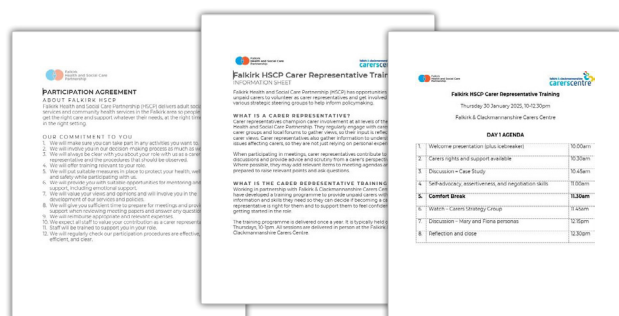
There are also opportunities to hear insights from existing Carer Representatives.

A comprehensive carer involvement pack has also been produced to support this training which includes:

- **Carer Representative information sheet** which includes details of the carer rep role and training; recruitment and selection process; on-going support that will be provided (including digital support); contact details to express an interest.
- **Participation agreement** which includes details of the HSCP's commitment to carers; what is required of carer representatives; training, support and mentoring and expenses that will be provided.
- **HSCP carer involvement opportunities template** which includes purpose of group; governance process; membership and contact information; meeting dates/frequency.

In 2024/25, this training was delivered with a group of carers in Falkirk. The Carer Centre and the HSCP worked collaboratively to support this process, which has been a key element of its success. It has resulted in a core group of 10 Carer Representatives now being involved in a range of IJB/HSCP strategic planning groups. This includes a new Carer Rep and Depute Carer Rep on the IJB, as well as involving the outgoing Carer Rep in another strategic group.

The process supported carers to fully understand the commitment required to become a Rep, enabling carers to make informed decisions about their level of involvement. On-going mentoring support is also provided by the Carers Centre and HSCP to ensure Carer Reps are fully supported to undertake their roles.



Leadership programme: *From Recognition to Rights*

This seven-part leadership programme has been developed by COCIS and was delivered in partnership with North Lanarkshire Carers Together in 2023.

The programme explored carers rights and legislation; information about local decision-making structures and processes; examples of advocating for change; carers interests and experiences; presentation skills; preparing and presenting a vision for change.

Delivery of this training was supported by a range of materials including the history of the carers movement, application form and HSCP organisational chart. A report was produced on conclusion of the leadership programme in North Lanarkshire and learning was shared at an event involving carers and key members of the IJB/HSCP and local councillors.

“We noticed a few carers who attended the Carers Forum had an interest in getting more involved in policy and service development. We spotted an opportunity to work together (COCIS and North Lanarkshire Carers Together) to develop a capacity building programme. We developed an outline programme of topics, and the sessions created a really strong peer support environment. The event at the end of the programme where carers and invited guests discussed the key issues identified in the programme was really positively received. The group of carers who took part have since become involved in various strategic developments, including involvement in the Carers Strategy. This work has shown how important it is to build a collaborative approach between carers, third sector and statutory sector where everyone is involved as equal partners. And that there needs to be involvement pathways with different levels and ways for carers to get involved.”

– Carers Centre & COCIS

Building on the programme’s success, COCIS is delivering the leadership programme with carers in the Moray area, and North Lanarkshire Carers Together will deliver the programme again later in 2025.



Training for Carer Representatives

This three-part training course was developed by COCIS and Carers Scotland and delivered in five local areas. It explores the role of the IJB/HSCP; local decision-making structures; local opportunities for involvement; and key elements of the Carer Rep role; as well providing opportunities to meet with IJB Carer Reps and the Carers Centre team.

Whilst COCIS’ delivery of this training has now come to an end, template training agendas (Session One; Session Two; Session Three) are available for local areas if they would like to adapt this course for local delivery.



2 Stage two: Recruitment



WHY this is important:

An inclusive and supportive process is key to recruiting Carer Reps to IJB roles. This helps carers who may be interested in becoming involved to fully understand the scope and scale of the role.

WHAT is involved

Recruitment has two key elements:

- 1. Recruitment resources:** clear role description and recruitment information.
- 2. Recruitment process:** advertising the role within carer networks; hosting an information session to help carers fully understand what the role involves.



“Recruitment packs often talk about what’s involved in being a Carer Rep on IJB, but you’re not just a Rep on the IJB. To do the job properly, you’re part of all these subcommittees, governance committees, forums and working groups – as well as various carers meetings and gatherings.”

– Carer Rep

HOW to improve recruitment

1. Develop recruitment resources

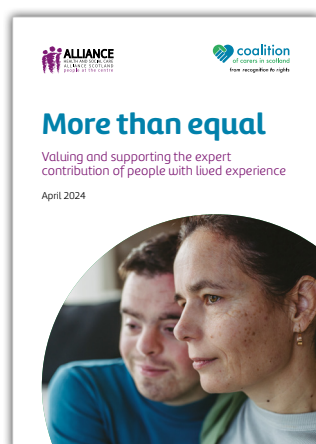
Develop a recruitment pack for carers which includes as a minimum:

- **Role description:** a clear role description is essential to support carers to understand the key responsibilities, time commitment involved and skills required.
- **Details of support that will be provided:** recruitment materials should also include information about the support which will be provided by the IJB/HSCP to enable Carer Reps to undertake their role. This can include induction processes; training and development opportunities; compensation of expenses; mentoring support; and an outline of the IJBs commitment to valuing carer expertise and experience.

2. Strengthen recruitment processes

Sharing information about the role with carer networks is key to ensuring an inclusive process. This includes:

- **Strengthening diversity:** consider the broad range of carer networks in the local area to ensure the information reaches a diverse range of carers (such groups for those with specific caring roles or sections of the community).
- **Information sessions:** hosting an information session with interested carers can help them fully understand the role and allows questions to be addressed. Key people to involve in this information session include existing Carer Reps; HSCP staff (e.g. Carers Lead); IJB members (e.g. Chair); and carer organisation/s supporting carers to be involved in the recruitment process.



Good practice and resources

Role adverts

COCIS has developed images that can be used in written materials and on social media when advertising the role. Please [get in touch](#) to receive a copy of the images.



Template role description

This [template](#) produced by the Carers Collaborative outlines key responsibilities for the carer and the IJB.

It includes an outline of the Carer Rep role and skills required, as well as the support and resources that will be provided by the IJB.



The template also offers guidance on how this resource can be adapted to fit local circumstances.

More than Equal report

This [report](#), produced by COCIS and the ALLIANCE, makes a series of recommendations to improve involvement of carers and people with lived experience on IJBs.

In particular, it outlines four key areas of development and actions IJBs can take to strengthen recruitment and representation.

3 Stage three: Induction



WHY this is important:

Carer Reps should not have to ‘find their own way’ when joining the IJB. A robust induction process is essential to supporting Carer Reps in preparing for and carrying out their role.

WHAT is involved

Induction has two key elements:

- 1. Induction resources:** these should include, the IJB structures, processes and personnel; expenses policy; IT equipment and processes; and any other resources carers need to undertake their role effectively.
- 2. Induction process:** mentoring and shadowing with outgoing Carer Reps; meetings with key IJB members and HSCP personnel (e.g. Chair; Chief Officer); named contact within HSCP who will provide support (e.g. sending out papers; etc).



“I’ve said I would be prepared to do a year’s mentoring with a new Carer Rep, which is only four IJB meetings. I really think it needs about a year to have gone through the whole process that the Partnership goes through in a year, to be able to understand exactly what it’s all about and who everyone is.”

– Carer Rep

HOW to improve induction

1. Develop induction resources

Develop (and keep up to date) a clear and accessible induction pack for Carer Reps. As a minimum, this pack should include information about:

- **IJB structures, processes and key personnel:** including the links between the IJB and other strategic groups; meeting dates; information about IJB members and members of associated strategic groups.
- **Expenses policy:** IJB expenses policy; expenses claim form; and details of the process for expenses claims.
- **Resources that will be provided to enable the Carer Rep to undertake their role:** including IT equipment; information about IT processes that are used; named contact person who will provide support (e.g. processing expenses; sharing agendas/papers).
- **Support to undertake the role:** outline how Carer Rep support needs will be met to enable them to undertake the role. This could include replacement care; adjustments to reduce barriers to participation (e.g. dyslexia; physical, visual or auditory needs).

2. Strengthen induction process

Mentoring, shadowing and supporting Carer Reps as they begin their role is critical to success. This includes:

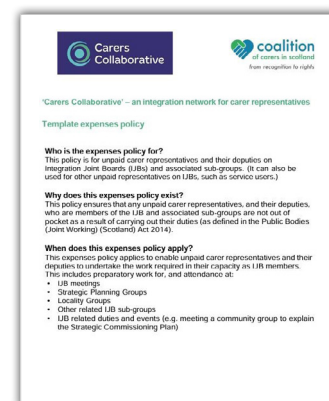
- **Welcome meetings with IJB members and HSCP leadership:** introductory meetings with key IJB members and HSCP personnel (e.g. Chair; Chief Officer) help new Carer Reps feel welcomed and valued as an IJB member. These meetings help new Carer Reps build relationships; hear about the IJB/ HSCP's commitment to carer involvement; ask questions about IJB processes and the Carer Rep role.
- **Mentoring and shadowing:** shadowing and mentoring from the current/outgoing Carer Rep/s is a hugely valuable support to incoming Carer Reps. This allows new Reps to ask questions, observe processes and practices and builds their confidence in undertaking the role. Current Carer Reps note that this mentoring process is most effective when carried out for at least six months.
- **Meetings with HSCP personnel:** introductory meetings with key contact person in the HSCP who will provide support.

Good practice and resources

Expenses policy template

This [template](#) produced by the Carers Collaborative can be used to develop a clear expenses policy for Carer Reps on IJBs.

It ensures Carer Reps are not out of pocket for expenses they incur as a result of carrying out their duties and can be adapted to suit local processes and needs.



4 Stage four: Carer Rep support



WHY this is important:

Carer Reps need on-going support to enable them to undertake their role effectively. Carers' time and energy are precious and limited, so support is vital to allow them to juggle caring with providing effective representation.

WHAT is involved

Carer Rep support has three key elements:

- 1. Support from IJB/HSCP:** regular meetings with key IJB members/HSCP leaders; training and development; support from Carers Lead; named person for administrative support.
- 2. Support to engage with carers:** regular engagement with other carers is a key part of the Carer Rep role and must be supported and adequately resourced.
- 3. Sharing the load:** make the role more manageable, and attractive, by having a larger pool of carers to undertake representative roles.



“The connection between the Carers Centre and the HSCP is vital, and a key part of the success of us working together is that we put the carers first.. Having the HSCP coming along to the Carers Voice group is really important to proactively engage with carers. And we have a feedback loop – ‘you said, we did’ – so that trust is built because carers can see that their feedback is being used to change things.”

– Carer Rep and HSCP

HOW to improve Carer Rep support

1. Support from the IJB/HSCP

Regular meetings and on-going support from the IJB/HSCP is key to enabling Carer Reps to undertake their role. This includes:

- **Regular meetings with key IJB members / HSCP leads:** this can involve pre-meetings with the Chair/HSCP lead officers to discuss IJB papers and clarify points; meetings to discuss key aspects of IJB business (e.g. finances and budgets).
- **Training and development:** ask Carer Reps about any training needs they have (e.g. IT training; training on specific elements of the IJB process); review Carer Rep support needs which may change over time (e.g. replacement care).
- **Support from Carers Lead:** many IJBs have a Carer Lead who can provide a critical link between Carer Reps, the IJB structures; and key developments relating to carers (e.g. Carers Strategy).
- **Administrative support:** provide Carer Reps with a named person within the HSCP to support the administrative elements of the role (e.g. IJB paperwork; claiming expenses).

“Every six weeks Carer Reps and Service User Reps meet with the Chair of the IJB and Chief Officer of the HSCP. All these meetings are minuted and we’ve also developed a joint action plan.”

– Carer Rep

2. Support to engage with carers

Engaging with other carers is a fundamental aspect of the Carer Rep role. Engagement does not happen by magic, it must be prioritised and adequately resourced to ensure it is effective and meaningful. This includes:

- **Engagement on IJB business:** papers must be sent to Carer Reps in adequate time to allow them to engage with other carers. Receiving the papers only a few days in advance severely restricts Carer Reps’ ability to undertake this engagement.
- **Prioritise support for engagement:** Carer Reps must be properly supported to undertake this aspect of their role in a meaningful way. This support can come in different forms and includes support from Carers Centres / carer organisations; support from HSCP Carer Lead. It works best when collaborative relationships and trust are built between the HSCP, Carer Reps, carer support organisations and networks.

3. Sharing the load

The Carer Rep role can become overwhelming if only one Rep is appointed. To mitigate this risk:

- **Appoint two Carer Reps to the IJB:** this allows Carer Reps to share the workload; have peer support; and provides cover if a Carer Rep needs to take time away from the role.
- **Develop a pool of carers:** this enables involvement across the strategic groups and meetings by a broader pool of carers. This makes the role more manageable and attractive by sharing the workload and supports more diverse representation.

“I would like to see a much larger group of carers on the IJB who could then diversify onto different strategic groups. As a minimum there should be at least two Carer Reps on the IJB. We need a group of carers, half a dozen at least, in every locality. Given there are at least as many unpaid carers as professionals in every local authority this should be possible.”

– Carer Rep

“I’ve been pushing for a long time to get at least two Carer Reps on the IJB. It’s great to have two at the meeting but it also means if one [Rep] needs to drop out, which can easily happen, then there is cover. And you get mutual support as well.”

– Carer Rep

“Our area is fairly unique in that both of our Carer Reps can sit at the table for every IJB meeting. In a lot of other areas, the Carer Rep has a deputy who is a substitute if they can’t attend and only one Rep sits at the table. But in our area we can both attend and contribute to all the IJB meetings.”

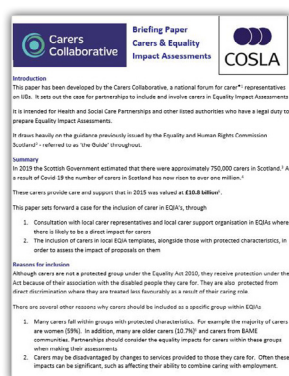
– Carer Rep

Good practice and resources

Equality Impact Assessment Briefing Paper

This [paper](#) produced by the Carers Collaborative outlines the importance of including unpaid carers in equality impact assessments undertaken by HSCPs/IJBs.

Adopting the recommendations within this Briefing Paper supports meaningful Carer Rep involvement and embeds carers rights at the heart of policy-making discussions and developments.



Membership of the Carers Collaborative Forum

The Carers Collaborative is a national forum which is facilitated by the Coalition of Carers in Scotland and funded by the Scottish Government. It holds quarterly meetings which bring together carer reps from across Scotland for support, training, practice sharing and the development of best practice resources, many of which are featured in this guide.

You can learn more about the Carers Collaborative [here](#) and can contact them for more information at coalition@carersnet.org.

Support with IJB papers

Papers for the IJB are lengthy and complex. Support to review the papers allows Carer Reps to clarify any questions and feel prepared to take part in discussions:

- In **North Lanarkshire** Carer Reps take part in a pre-meeting with members of the local TSI and Stakeholder Engagement & Participation Strategy group to discuss papers and reports.
- In **Falkirk** mentoring support is provided by the Carers Centre to help Carer Reps to review papers and prepare for meetings, as well as follow-up support as and when needed between meetings.
- In other IJB areas, Carer Reps have regular meetings with HSCP officials to discuss agenda items and reports. This enables questions to be discussed before the meeting, and follow-up communications also happen after the meeting to progress any issues that have been raised by Carer Reps.

5 Stage five: Succession



WHY this is important:

Robust succession planning ensures carer representation on IJBs. It is essential that this process is planned well in advance of Carer Reps roles becoming vacant.

WHAT is involved

Succession planning has two key elements:

- 1. Succession process:** succession planning is a process, not something to be done every few years.
- 2. Handover and exits:** effective succession planning happens well in advance to allow adequate time for handover and exit of existing Carer Reps.



“There was a recruitment process a few years ago and around four people put themselves forward, however all dropped out. Two when they realised the time commitment and all the extra meetings etc, another when they realised it wasn't a paid post. The two current carer reps agreed to stay on.”

– Carer Rep

HOW to improve succession

1. Prioritise the succession process

Succession planning is not something to be done every few years (e.g. when existing Carer Reps are nearing the end of their term). To be truly effective it should be an on-going process of capacity building and support – linking back to stage one in this Guide! This includes:

- **Starting now:** Carer Reps report that for succession to be truly effective, the process needs to begin as soon as they are appointed. The term of office gives a clear timeline for when succession and handover will take place. Action needs to get underway well in advance, as capacity building to prepare future Reps takes time.
- **Connecting with carer networks:** strong carer networks provide the foundation for future involvement. Prioritising, resourcing and building relationships with carer networks is key to ensuring carers are supported to feel ready to take on representative roles.

2. Handover and exits

As highlighted at stage three (induction), the handover process is critical to successful succession – and it also shows the value placed on carer involvement. This includes:

- **Mentoring:** mentoring support helps newly appointed Carer Reps become familiar with the role. This support can come from outgoing Carer Reps or from carer support staff in the HSCP/Carers Centre.
- **Positive exits:** finally, it is best practice to conduct exit interviews with outgoing Carer Reps. This gives Carer Reps the opportunity to give feedback on their experience of undertaking the role, noting what has worked well and where improvements are needed. The exit interview process also gives the opportunity for the IJB/HSCP to thank the outgoing Carer Rep for their time and commitment to the role and their contributions to the work of the IJB.

Good practice and resources

In one IJB area the Carer Reps set up an election process to support succession planning. This process is supported by the local Carers Centre, the HSCP and Carers Voice group. The Carer Rep roles are advertised via the Carers Voice group, and by the Carers Centre and HSCP. Any carers who express an interest in becoming involved are invited to attend an information session with the Carers Centre, HSCP and Carer Voice representatives where it is made clear upfront about what the role involves, and the commitment required. Carer Reps are also asked for a commitment to being part of the Carer Voice group (if they aren't already) to ensure that they can represent the full range of carers views.

“We as unpaid Carer Reps decided we'd set up our own election process for the Carer Rep roles. At the most recent elections five or six carers came along to the information session to find out about the role. It's really important that carers who are interested understand upfront what the role involves. After the information session, none of the carers who had attended wanted to progress when they realised the amount of work that was involved. That meant that we, as the existing Carer Reps, were reinstated into the roles for another term.”

– Carer Rep

In another area, the Carers Centre asked the outgoing Carer Rep to give feedback on their experience of the role. This feedback showed that the role became too demanding, alongside the carer's work and caring commitments. This enabled other involvement opportunities to be identified, and the Carer Rep has remained involved in a less time intensive role.

“The outgoing Carer Rep worked full-time and was a carer, and the role ended up being too much. Because we had a good relationship we were able to ask if she'd like to be involved in a different way that wasn't so time consuming. She said she'd love to stay involved if there were other less time-intensive opportunities. We identified another group that we knew the carer might be interested in, and now she is involved in that role.”

– Carers Centre and HSCP

Next steps

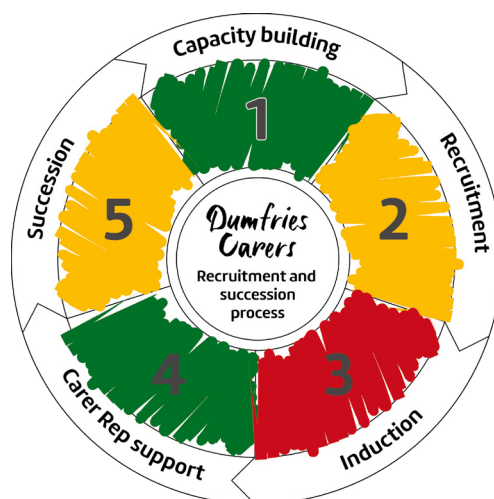
This Guide provides recommendations for action in each stage of the recruitment and succession process. The resources and good practice examples aim to provide IJBs/HSCPs, carer support organisations and carers with tools, ideas and inspiration for future development.



Assessment wheel

To get a snapshot of what's working well and where improvements could be made in your local area, you can print out and colour code the **assessment wheel** template on page 21 or download it [here](#).

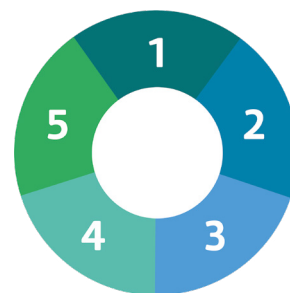
The **assessment tool** on page 22 allows you to make notes of progress and actions that may be needed at each stage. You can download additional copies [here](#).




More information:


If you would like more information on the ideas and resources discussed in this Guide, or to find out more about the Carers Collaborative, please [contact COCIS](#).


Recruitment and succession planning: **Assessment wheel**

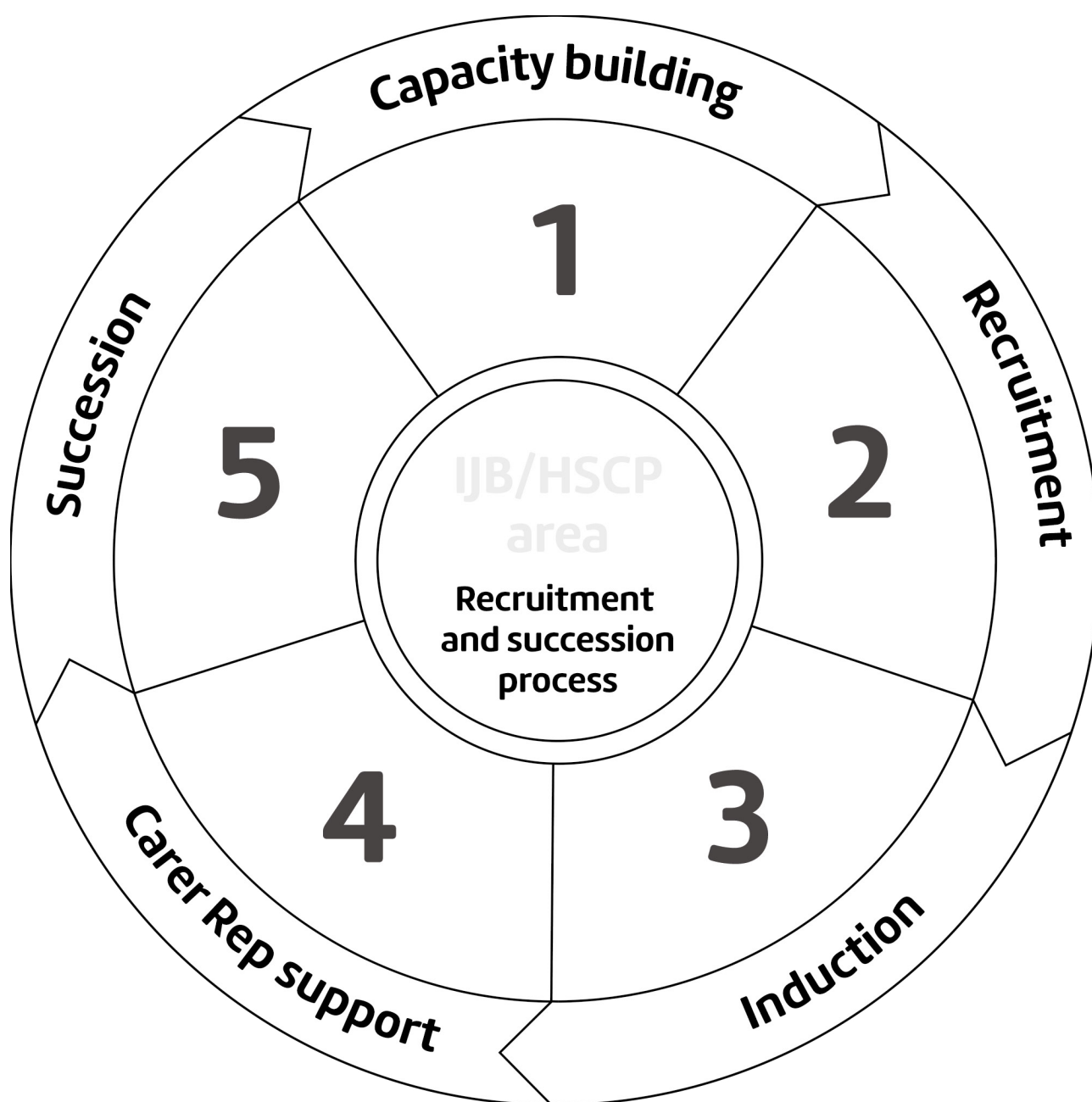


To get a snapshot of what's working well and where improvements could be made in your local area, use this straightforward colour coding to fill in each stage segment of the wheel.

 Processes are established and working well

 Improvement needed

 Still to be established / not working well



You can also use this [assessment tool](#) to make notes on progress and identify actions needed.

Recruitment and succession planning: **Assessment tool**

Stage #	Stage name	Progress so far	Action needed
1	Capacity building		
2	Recruitment		
3	Induction		
4	Carer Rep support		
5	Succession		



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