**Board Member Skills Audit**

There are many examples of skills audits that can be accessed from the web. The following is an example template that can be modified to suit your Trustee Board depending on its needs and current context. It is likely that not all of these headings will apply so you will want to adapt these.

**How to Use**

To ensure your Board has the skills and experiences to ensure it makes effective decisions and can carry out its duties effectively, it is good practice to ask current members what skills and experience they have.

Once you know this, you can better understand where there are gaps and therefore what you might be looking for if you are recruiting new trustees.

*Top Tip: To help with administration you may want to use free, online form software to collate the data (such as Google Forms).*

*Top Tip: Your needs as a Board will change over time, when you’re looking for gaps in skills across your Board, prioritise those areas that will really help you achieve your strategic priorities. What do you really need now?*

**Trustees’ Skills Audit:**

|  |  |  |
| --- | --- | --- |
| **Area of Skills, Knowledge, Expertise** | **Score** | **Any additional comments** |
| **Leadership in Voluntary Organisations** |  |  |
| Setting strategy and strategic goals |  |  |
| Leading teams to achieve objectives |  |  |
| Building communities, community organising |  |  |
| Campaigning, influencing and advocacy |  |  |
| Change management |  |  |
| Conflict management |  |  |
| Developing teams |  |  |
| Monitoring and evaluating charity performance |  |  |
| Project management |  |  |
| **Governance** |  |  |
| Understanding of the roles and responsibilities of a trustee/ director |  |  |
| Charity Law knowledge |  |  |
| Company law knowledge including trading subsidiaries |  |  |
| Risk management |  |  |
| Safeguarding |  |  |
| Strategy development |  |  |
| Chairing |  |  |
| **Stakeholder and Membership Engagement** |  |  |
| Event management |  |  |
| Membership engagement strategies and activities |  |  |
| Understanding of democratic principles and structures in student organisations (student voice) |  |  |
| Sector Expertise |  |  |
| Knowledge of Higher/ Further Education policy and context |  |  |
| Knowledge of voluntary sector |  |  |
| Knowledge of key current issues in the sector |  |  |
| Lived experience of the issues the organisation seeks to address |  |  |
| Networks/ connections with key stakeholders |  |  |
| **Finance** |  |  |
| Financial Management & accounting (e.g. budgeting, controls) |  |  |
| Strategic finance including financial strategy, reserves policies |  |  |
| Understanding accounts and financial information |  |  |
| Audit |  |  |
| Fundraising |  |  |
| **People** |  |  |
| Equality, diversity and inclusion |  |  |
| Wellbeing |  |  |
| People management practice |  |  |
| Volunteer Management |  |  |
| Recruitment |  |  |
| Performance management |  |  |
| Business Development |  |  |
| Commercial management |  |  |
| New business development |  |  |
| **Marketing, Research and Communications** |  |  |
| Research and insight |  |  |
| Social media |  |  |
| Press and PR |  |  |
| Developing marketing and/ or communications strategies |  |  |
| Digital strategies |  |  |
| **Estates and Facilities** |  |  |
| Property and Estates Management |  |  |
| Health and safety |  |  |
| **Data Management** |  |  |
| Data protection |  |  |
| Cyber security |  |  |

You can take an approach of asking the level of experience or knowledge someone has, an alternative approach is to ask the level of confidence you have in a particular area. So example scoring mechanisms can be:

|  |
| --- |
| 3 = Significant experience and expertise – I would consider myself an expert in this area |
| 2 = Some knowledge or experience – I would feel comfortable to advise in this area |
| 1 = Interested in learning more – I know about this but would not offer advice |
| 0 = No knowledge or experience – I do not know about this |

OR

|  |
| --- |
| 3 = Significant confidence in this area |
| 2 = Some confidence in this area |
| 1 = Little confidence in this area |
| 0 = Very unconfident in this area |