



Community &
Voluntary Services
cheshire east



Board Skills Audit Guidance Notes

A good Trustee board needs a range of skills, attributes and personal experience to enable it to work effectively towards the aims and objectives of the organisation. The skills, diversity and experience within a Trustee Board or Management Committee will vary as board members will come from a wide range of perspectives.

Building a picture of the skills of your current Board is an invaluable exercise and even if you aren't recruiting new charity trustees at the moment, building a picture of the skills of the current board is still worthwhile as it gives the board the information it needs to assess how it may be affected by retiring trustees or any new challenges the organisation faces. Having an established skill register will also help you target recruitment when new trustees are needed.

Carrying out a skills audit is a simple but easy way of compiling a register of your charity's board skills and experience and enabling you to assess what training and development Board members may need.

The Board Skills Audit Matrix attached, is a self-assessment exercise that can be used by both Trustees and Managers to help to determine the Board's strengths and areas for improvement and development. The first stage of your board skills audit should be to ask Trustees to complete this self assessment matrix.

Following this you can follow the steps below to complete the audit process

Step 1: Look at the current make up of the Board and ask the following questions:

- Does the Board's current composition represent the community it serves and if not how can these be achieved?
- Is there good diversity?
- If the organisation is national, is the board geographically diverse?
- What other organisations are important to the organisation and can they be represented on the Board?
- What specialist skills and expertise does the organisation need that are not represented in the Board at present?

Step 2: Assessing the skills, expertise and experience of Trustees

The next step is to assess the individual skills, expertise and experience of the Trustees using the information gathered from the self assessment exercise. From this you will be able to see what specialist skills and expertise are present and which are lacking in the Board at the moment.

Step 3: Evaluation and actions

Once the assessment above is completed then individual training needs areas can be collated to form a development plan for the Trustees individually and for the Board collectively. It can also be a useful tool in determining the skills you should be focusing on in any future searches for new Trustees.

When considering the development plan think of different ways in which Trustees can be supported to achieve competence in areas where they lack experience. This may be by accessing formal training available for trustees or it may be encouraging Trustees with particular experience to mentor another Trustee who lacks that particular skill.

Think about finding ways in which Trustees can gain knowledge of different aspects of the organisation by organising work shadowing or experience days when trustees get involved in helping with project work or activities which the organisation undertakes.

Step 4: Ongoing development and review

The relative success of the exercise can be tested on an ongoing and an annual basis by building the evaluation into the yearly appraisal process for both the Board and the individual trustees, with particular reference to the achievement of the objectives in the strategic plan.

Don't neglect the 'softer skills' which Board Members also need to demonstrate to undertake their role effectively. They ideally need a combination of intellect, personal presence and standing, and listening and communication skills and be able to make a cogent, clear and compelling case on behalf of the organisation.

They also need to evidence a strong personal commitment and empathy consistent with the organisation's mission and values and objectives and be willing to act as advocates in promoting the work of the organisation both within their personal networks and to the wider world.

Board Skills Audit Matrix

Please complete all sections ticking the numbered column which best reflects your level of experience

- 1 qualification/experience at senior level
- 2 some knowledge/experience
- 3 little or no knowledge
- 4 would like information/ peer support / practical experience / training

		1	2	3	4
A	Professional Skills				
1	Human Resources				
2	Accountancy				
4	Audit / risk management				
5	Change Management				
6	Income Generation/Fundraising				
7	Investment				
8	Legal				
9	Volunteer Management				
10	Marketing / Branding / Social Media				
11	Education /Training				
12	Senior Management/Director				
13	Policy/research				
14	Other – please specify <small>Other</small>				
B	Operating environment				
1	Voluntary / charity sector				
2	Public Sector				
3	Social /political environment				
4	Commercial /private sector				
5	Regulatory				
C	Management skills				
1	Strategic planning				
2	Project management				
3	Operational management				
4	Change management				

5	Financial / budget management				
6	ICT strategy				
7	Property management				
8	Governance				
9	Quality assurance				
10	Performance management				
11	Relationship Management				
14	Conflict Resolution				
15	Partnership working/networking				
16	Other- please specify :				
D	Other relevant skills/knowledge				
1	Chairing meetings				
2	Public speaking				
3	Administration				
4	Media / Social media				
5	Knowledge of community in which organisation operates				
6	Knowledge of beneficiaries of organisation				
7	Customer Care				
8	Campaigning				
9	Training				
10	History of the organisation				
11	Other – please specify				