

# Trustee Board Skills Audit Template

**Purpose:** To assess the current skills and experience of the trustee board, identify gaps, and inform recruitment and development strategies.

## Instructions:

1. **List all current trustees.**
2. **For each skill/area, rate each trustee's proficiency using the following scale:**
  - **0 - No Experience/Knowledge:** No experience or knowledge in this area.
  - **1 - Basic Awareness:** Limited understanding and some exposure.
  - **2 - Working Knowledge:** Understands the concepts and can apply them in routine situations.
  - **3 - Proficient:** Competent and experienced, can handle complex situations.
  - **4 - Expert:** Highly skilled and experienced, recognized authority in the area.
3. **Calculate the average score for each skill/area.**
4. **Identify skills/areas with low average scores (potential gaps).**
5. **Use the findings to inform board development and recruitment.**

## Notes:

- This template can be customised to fit the specific needs of your organisation.
- Consider including demographic information (e.g., age, gender, ethnicity) for diversity analysis.
- It is important to remember that this audit is a tool to help the board improve, and it should be done in a constructive and supportive environment.
- Consider conducting this audit annually, or bi-annually.

**Trustee Board Skills Audit:**

**Organisation Name:** \_\_\_\_\_ **Date of Audit:** \_\_\_\_\_

**Trustees:**

Trustee Name

**Skills/Areas:**

Skill/Area	Trustee 1	Trustee 2	Trustee 3	Trustee 4	Trustee 5	Trustee 6	Average Score
<b>Governance &amp; Legal</b>							
Strategic Planning							
Risk Management							
Financial Oversight & Accounting							
Legal & Regulatory Compliance							
Charity Law							
<b>Operational &amp; Management</b>							
Human Resources Management							
Project Management							
Information Technology & Data Security							
Fundraising & Income Generation							
Marketing & Communications							
Program Evaluation & Impact Measurement							
<b>Specific Sector Knowledge (if applicable)</b>							
(e.g., Education, Healthcare, Arts)							

Skill/Area	Trustee 1	Trustee 2	Trustee 3	Trustee 4	Trustee 5	Trustee 6	Average Score
<b>Interpersonal &amp; Soft Skills</b>							
Communication & Presentation Skills							
Teamwork & Collaboration							
Negotiation & Conflict Resolution							
Critical Thinking & Problem Solving							
Networking & Relationship Building							
Understanding of the beneficiary group.							
<b>Other (Add specific skills relevant to your organisation)</b>							

**Analysis & Action Plan:**

**1. Identified Skills Gaps (Areas with low average scores):**

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**2. Potential Causes of Skills Gaps:**

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**3. Action Plan to Address Skills Gaps:**

- **Board Development:**
  - Training workshops or seminars on specific topics.
  - Mentoring or peer learning programs.
  - External consultants or advisors.
- **Recruitment:**
  - Targeted recruitment to fill specific skills gaps.
  - Developing a skills matrix for future trustee recruitment.
  - Clearly outlining required skills in trustee role descriptions.

- **Other Actions:**

- Delegation of tasks to external experts.
- Utilising advisory committees.
- Reviewing and updating board policies and procedures.

**4. Timeline for Action Plan Implementation:**

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**5. Responsibility for Implementation:**

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**Review Date:** \_\_\_\_\_