

Doing a skills audit

An effective charity board has trustees with a good range of skills and qualities, and a variety of professional and personal experience. The ideal mix will depend on the nature of the charity, but having a diverse board – where trustees have different experiences and perspectives – will help to ensure the board will make well-rounded decisions.

A skills audit is a useful tool for mapping out the skills and expertise of trustees to see if you have the right mix and to identify any gaps in the board's overall skills. It will also let you see how it may be affected if a trustee leaves or your charity faces any new challenges.

When to do a skills audit

The most common time to do a skills audit is when you are recruiting new trustees. However, skills audits should be done regularly – at least annually – because your trustees' skills and experience will change, and you will be able to respond more quickly when you need new trustees if you already have an up-to-date skills register.

What an audit should cover

Your board needs the expertise to:

- exercise overall control of the organisation's current business operations
- manage the charity's resources responsibly
- set the strategy and oversee its implementation
- ensure that the needs of your organisation's beneficiaries are put first
- keep the charity true to its purpose.

Skills audits are good for reflecting on the functional skills that your board needs. They can also focus on other aspects of your board, such as diversity. Does your board reflect the community that you serve in terms of gender, age, ethnicity, disability, lived experience and/or class? Is there a role for service users on your board?

How to do a skills audit

You can do a skills audit in various ways. You could ask each trustee to complete a printed or online audit and then you could collate the results. Alternatively, the chair could complete the audit as part of an annual face-to-face appraisal with each trustee. Or you could ask an external advisor to undertake an audit.

We have a sample skills audit that you can use or adapt for your charity.

Skills audit template

Organisation name:

Who will lead the skill audit	<i>Name</i>	<i>Comments</i>
Who will be involved in the process	<i>Name(s)</i>	<i>Comments</i>
How is confidentiality being managed?		
What are our resources?		
Our timescales		
	Dates	
Reviewing new activities (step two)		
Meet with trustees and review their skills (step three)		
Complete evaluation (step four)		
Skills audit complete by		

Think about the activities that your organisation plans to undertake over the coming year.

Do you have any specific objectives that need to be met? What new skills are required? (For example, policy, marketing, legal, etc.)

Area of work	Skill(s) needed	Who has the skills to do this?

Individual trustee skills audit

The following should be filled out by each member of the board to identify the skills they bring to the organisation.

Name

Level of expertise: 1 = highly experienced, 2 = proficient, 3 = some experience, 4 = no experience

Skills, expertise, knowledge qualifications	Level of Expertise				Comments
	1	2	3	4	
Administration					
Board/committee experience					
Campaigning					
Change management					
Charity/voluntary organisation governance					
Conflict resolutions					
Customer care					
Digital					
Enterprise/business development					
Facilitating meetings					
Finance					
Fundraising					
HR/Training					
Income generation					
Influencing					
IT/systems					
Leadership					
Legal					
Listening					
Marketing					
People management					
PR/communications					
Project management					
Property					
Relationship management					
Service user/beneficiary of the organisation					
Team development					
Voluntary sector experience					
Other (Specialist experience or qualification relevant to voluntary organisations e.g. medical, campaigning, advice, etc.)					

Motivation

Do you have a particular interest or reasons for being/wanting to be a trustee of this organisation?

Diversity

A diverse board is able to reflect and support the delivery of an organisation's mission. Do you have a specific service user experience, social or family experience, background or general interests that will help us support the goals of the organisation?

Areas or work

Are there any areas of the work of the organisation you have a particular interest in and/or would like to become more involved in?

Skills audit evaluation

Reflect on the information obtained in previous two templates. This step is to help you assess the current board in relation to your organisation's objectives and potentially identify skill gaps.

1. Do you have a clear map of the existing skills and knowledge among trustees within the organisation?

YES

NO

2. What key skills have you identified in the existing Board?

Skills identified

-
-
-

3. What are the mid-term/long-term objectives of your organisation?

Organisation's objectives:

-
-

4. Is our Board of Trustees diverse enough? Are there gaps? What can we do to make it more diverse?

Identify skills needs

Reflect on the existing skills of your current board against the skills needed in order to achieve the objectives of the organisation.

What skills do you need in order to achieve the mid-term/long-term objectives of your organisation?

Skills needed	Do we have this skill at present? Yes/No

Next steps

This section is for you to list the actions that follow your evaluation.

What do you need to do next to ensure your trustee board has all the skills required?

You may consider the following: Reviewing policy procedures, recruitment of new trustees, training/further development of board members, etc.

Action	Date to be completed by

Final reflections

Reflect on the skills audit process and use this information for future skill audits.

What was successful about the skills audit?

What would you do differently on the next skills audit? (Include reasons if you ticked No in Question 1)

What actions do you need to take forward to the next skills audit?