

## Board Health Check, Skills and Training

### Board Succession Planning: Individual Trustee Skills Audit

This table has been designed to be filled out by each member of the board to help identify the skills that they bring to the organisation. It should be filled in individually or as part of the annual appraisal process in face to face meetings between each board member and the chair.

It can also be used as part of the recruitment process to identify the skills that a new trustee could bring to the organisation. You could ask all applicants to complete it as part of the application process or it could be used during the interview or as part of initial induction.

|      |
|------|
| Name |
|------|

Level of expertise 1. highly experienced 2. proficient 3. some experience 4. no experience

| Skills/experience/knowledge/qualifications | Level of expertise |   |   |   | Comments |
|--|--------------------|---|---|---|----------|
|  | 1                  | 2 | 3 | 4 |          |
| Administration                             |                    |   |   |   |          |
| Board experience                           |                    |   |   |   |          |
| Campaigning                                |                    |   |   |   |          |
| Change management                          |                    |   |   |   |          |
| Charity/voluntary experience               |                    |   |   |   |          |
| Conflict resolution                        |                    |   |   |   |          |
| Customer care                              |                    |   |   |   |          |
| Digital                                    |                    |   |   |   |          |
| Enterprise/business development            |                    |   |   |   |          |
| Facilitating meetings                      |                    |   |   |   |          |
| Finance                                    |                    |   |   |   |          |
| Fundraising                                |                    |   |   |   |          |
| HR/training                                |                    |   |   |   |          |
| Income generation                          |                    |   |   |   |          |
| Influencing                                |                    |   |   |   |          |
| IT   |                    |   |   |   |          |
| Leadership                                 |                    |   |   |   |          |
| Legal                                      |                    |   |   |   |          |
| Listening                                  |                    |   |   |   |          |
| Marketing                                  |                    |   |   |   |          |
| People management                          |                    |   |   |   |          |
| PR/communications                          |                    |   |   |   |          |
| Project management                         |                    |   |   |   |          |
| Property                                   |                    |   |   |   |          |
| Relationship management                    |                    |   |   |   |          |
| Service user/beneficiary of organisation   |                    |   |   |   |          |
| Team development                           |                    |   |   |   |          |

|  |  |  |  |  |  |
|--|--|--|--|--|--|
| Voluntary sector experience  |  |  |  |  |  |
| Other (specialist experience or qualifications relevant to charities, social enterprises, voluntary organisations) |  |  |  |  |  |

**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 on an organisation’s mission. Do you have a specific service user experience, social or family experience, background or interest that will help us to support the goals of the organisation?

**Areas of 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?