

## Board Health Check, Skills and Training

### Board Succession Planning: 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 recruit 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

The first step of the skills audit is to assess the individual skills you have on your board use the '**Board Succession Planning: Individual Trustee Skills Audit**' handout at this stage. This can be used 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.

The second step is to create a skills map which identifies the breath of skills present within the board.

This step involves collating the information you collected during step one using this to fill in the **'Board Succession Planning: Skills Audit Evaluation'** template provided in this pack. This will also help you to identify the any gaps within the skill set of your board and may point towards a recruitment opportunity.