

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?