

Specimen Skills Register for Charity Trustees

For a charity to build and maintain an effective trustee board capable of fulfilling the charitable object, it is imperative that the trustees collectively possess a range of skills, attributes and experience predisposed to furthering the charity's aims and implementing the strategic and business plans of the organisation, to constructively challenge the policies and proposals put to the board.

This guidance provides a specimen skills register for charity trustee boards and should be read in conjunction with other Guidance Notes in the series, in particular *The Roles and Duties of Charity Trustees*.

Trustee qualities

The trustee board should have a range of skills and experience available to help the charity develop and deal effectively with any challenges that arise. Some trustee boards include users of the services the charity provides, professionals, and those with an interest in that particular cause.¹

As with any organisation, it is not necessarily advantageous to have fixed criteria for board composition, but to make sure that the board has the requisite collective experience to satisfy the requirements of the governing document and to ensure that the strategic and business plans are implemented effectively. It should be remembered that the skills the board requires can come equally from professional, social and family experiences.

In order to assess whether the trustee board has the knowledge and experience to meet the challenges the charity faces and to achieve the organisation's goals, it may be helpful to undertake a skills audit and maintain a skills register. A skills audit will highlight those key attributes required and identify where that knowledge is held in the trustee board, or where such professional guidance needs to be acquired by other means (e.g. by hiring an appropriately qualified expert, or by co-opting a trustee to the board with the requisite skills and/or appointing appropriately qualified staff).

A skills audit and register will also be able to provide guidance, when recruiting a new trustee, as to the most desirable experiences and knowledge required and help to shape the recruitment and appointment process. A skills audit may also be incorporated into any periodic board performance evaluation that the charity undertakes to ascertain the effectiveness of the board, sub-committees and individual trustees. Where a charity has adopted regular board performance reviews, it is likely that the skills set of each trustee will be discussed with the facilitator of the exercise, which thereby provides a way of assessing the degree of knowledge and understanding each trustee professes to have. Consequently, ongoing training and trustee development programmes can be organised and tailored to augment the skills, experience and knowledge of the board in line with the requirements of the charity's needs.

For larger charities, it may be that a nominations committee also plays an integral role in the skills audit and devises ongoing programmes to improve the skills of the board via a range of options such as training, site visits, mentoring, or trustee recruitment.

For trustees, a skills audit and skills register may provide a useful opportunity to formally record the new skills they have acquired and also list any other training or development they have undertaken in another role that may be beneficial to the charity.

¹ Further information can be found in the Charity Commission's report RS1: *Trustee Recruitment, Selection and Induction*, March, 2002.

Undertaking a skills audit periodically, preferably not less than once a year, will enable the charity to gain a clear picture of the skills possessed by the board and identify sources of knowledge and experience available and/or missing at a specific point in time. The following specimen document can be adapted to suit the particular requirements of individual charities undertaking a skills audit.

Specimen skills audit form for trustees

ABC Charity operates a register of skills of all members of the trustee board so as to easily identify sources of specific skills and expertise when particular situations arise. Such a register will also highlight the circumstances when it would be prudent to acquire certain expertise and professional guidance from outside the body when trustees collectively do not have the appropriate skills and knowledge.

The register is for use within *ABC Charity* only, and the information will not be shared with anyone outside of the trustee body or the charity without due consideration and permission. The data shall be collected in accordance with the Data Protection Act 1998.

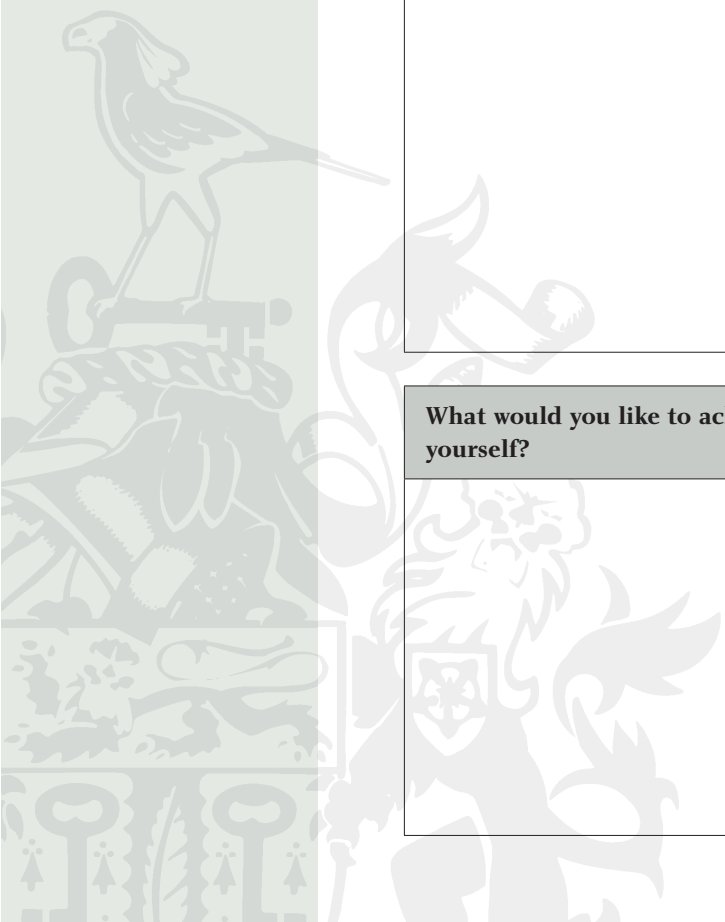
This register will be maintained regularly by the charity secretary each year or whenever there are significant changes to the register.

Please list the skills that you have that may be of use to the ongoing duties and responsibilities of the governing body.

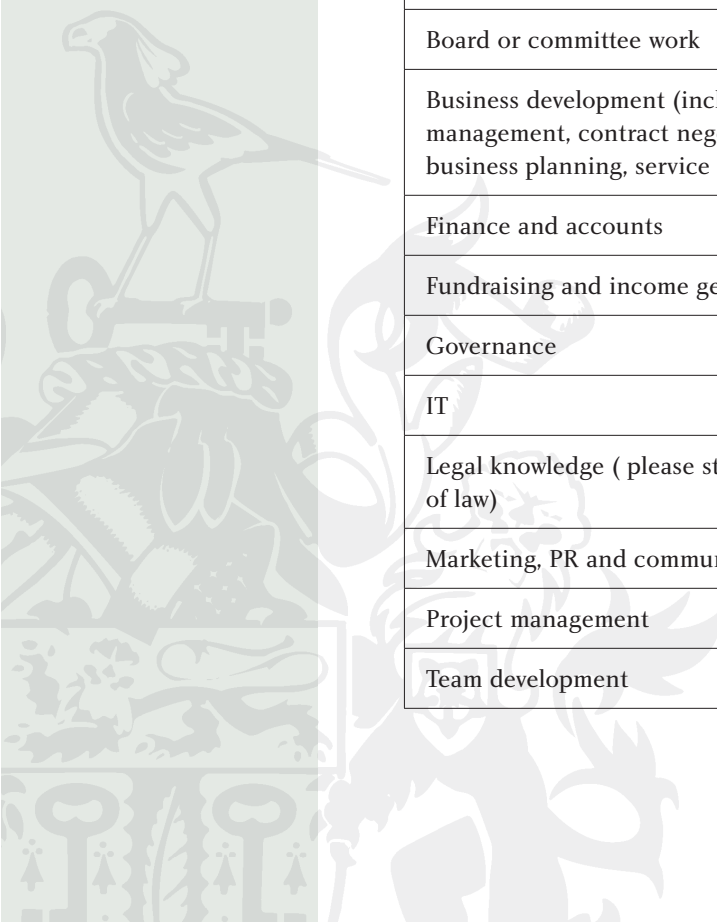
Name of trustee

**What motivated you to become a trustee of *ABC Charity*?
What do you believe will be the most important contribution you can make?**

What would you like to achieve in your time as a trustee, for the charity and for yourself?



Description of skills/expertise/knowledge/professional qualifications	How it may benefit governing body
Carer of service user	Good understanding of the issues facing other parents of pupils re: standards of services provided by ABC Charity and others.
Local government councillor	Expertise in the various procedures dealing with local authority funding of voluntary and statutory agencies, planning application process, etc.
Knowledge of marketing techniques acquired through working life	Professional knowledge that could be used to improve the charity's marketing and communications strategy.
ABC Charity has identified the following skills/expertise/knowledge as being key to fulfilling their strategic and business plans and charitable objects.	Please highlight what, if anything, you could add in respect of each of the identified areas listed.
Administration	As a local authority councillor I am familiar with administrative procedures relating to meetings and the co-ordination of information between different groups of stakeholders.
Campaigning and influencing	
Board or committee work	
Business development (including change management, contract negotiations, business planning, service delivery, etc.)	
Finance and accounts	
Fundraising and income generation	
Governance	
IT	
Legal knowledge (please state which area of law)	
Marketing, PR and communications	
Project management	
Team development	



Are there any other skills or experiences you would like to share that may be of benefit to the charity?

What areas of the charity's activities interest you and would welcome further training and information about?

Signed _____

Dated _____



ABC Charity skills register for trustee body

The following table provides information of the skills, experience, and expertise of individual trustees that could be used by the trustee body collectively in fulfilling their roles and responsibilities in furthering the charitable objects of the organisation.

Skills/expertise/knowledge	Skills or expertise that may be use to the charity and board of trustees	Trustees' name
Business development	Understanding of contract services, finances/ accounts, employment issues, general business acumen	J. Bloggs T. Simpson L. Stewart
Fundraising and income generation	Expertise in the various procedures dealing with local authority funding of voluntary and statutory agencies, planning application process, etc.	C. Thomas D. Tipper
Service delivery	Good understanding of the issues facing other carers, e.g. standards of services provided by ABC Charity and others.	E. Paul C. Thomas S. Cauldwell
Marketing, PR, communications	Professional experience of marketing matters, membership of CIM.	C. Thomas
Miscellaneous	Active members of local community with sound knowledge of local needs and network of contacts.	A. Smith


Signed _____

Dated _____

Chair of trustees/charity secretary

March 2008





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