# Trustee skills analysis template

|  |
| --- |
| Name: |
| Relevant roles (paid & voluntary): | Training or qualifications: |
| Key skills & knowledge gained from these: | Memberships: |
| Social networking memberships: |
| What other experience or skills do you feel you offer?(e.g. languages) | Relevant contacts or relationships: |
| *Please indicate if you have skills or knowledge or qualifications in the following areas (tick those that apply):* | **Interested** | **Some Knowledge** | **Expert** |
| **Core trustee activities:** |
| Leadership & senior management | [ ]  | [ ]  | [ ]  |
| Governance/trustee responsibilities  | [ ]  | [ ]  | [ ]  |
| Financial/ book keeping/ accounting  | [ ]  | [ ]  | [ ]  |
| Property management | [ ]  | [ ]  | [ ]  |
| Change management  | [ ]  | [ ]  | [ ]  |
| Business/Strategic planning | [ ]  | [ ]  | [ ]  |
| Risk management and insurance | [ ]  | [ ]  | [ ]  |
| Legal - Charity Law; Company Law | [ ]  | [ ]  | [ ]  |
| Committee procedures/ chairing meetings | [ ]  | [ ]  | [ ]  |
| Equalities & valuing diversity | [ ]  | [ ]  | [ ]  |
| Networks/ alliances /influence | [ ]  | [ ]  | [ ]  |
| Knowledge of the community | [ ]  | [ ]  | [ ]  |
| Fundraising/income generation | [ ]  | [ ]  | [ ]  |
| **Other areas:** |
| Campaigning | [ ]  | [ ]  | [ ]  |
| Policy implementation  | [ ]  | [ ]  | [ ]  |
| Project management | [ ]  | [ ]  | [ ]  |
| Computers & Information technology  | [ ]  | [ ]  | [ ]  |
| Health & Safety | [ ]  | [ ]  | [ ]  |
| Management/ management systems  | [ ]  | [ ]  | [ ]  |
| Conflict resolution/ relationship management | [ ]  | [ ]  | [ ]  |
| HR/ employment law/restructuring  | [ ]  | [ ]  | [ ]  |
| Supervising staff  | [ ]  | [ ]  | [ ]  |
| Safeguarding | [ ]  | [ ]  | [ ]  |
| Marketing/Media/PR/ Social media  | [ ]  | [ ]  | [ ]  |
| Research | [ ]  | [ ]  | [ ]  |
| Training | [ ]  | [ ]  | [ ]  |
| Expertise relating to client group/services | [ ]  | [ ]  | [ ]  |
| What motivated you to join the board? What areas of work are you particularly interested in? |
| Do you have any potential conflict of interest issues?(e.g. relationships, financial arrangements, other charity involvements) |
| **Are you aware of the legal responsibilities of trustees? They are;** |
| Ensuring compliance (with governing document and any regulatory requirements | Yes [ ]  | No [ ]  |
| Duty of prudence | Yes [ ]  | No [ ]  |
| Duty of care | Yes [ ]  | No [ ]  |
| If not, please read “The Essential trustee” by the Charity Commission and the Charity Code of Governance at your earliest convenience and discuss this with your Chair. |
| **Are you aware of the legal responsibilities of trustees? Please confirm that none of the following apply to you:** |
| You have an unspent conviction for an offence involving dishonesty or deception  | Yes [ ]  | No [ ]  |
| You are currently declared bankrupt (or are subject to bankruptcy restrictions or an interim order) or has an individual voluntary agreement (IVA) with creditors  | Yes [ ]  | No [ ]  |
| Are [disqualified from being a company director](https://www.gov.uk/company-director-disqualification)  | Yes [ ]  | No [ ]  |
| Have previously been removed as a trustee by either the commission or the High Court due to misconduct or mismanagement  | Yes [ ]  | No [ ]  |
| If any of these apply to you, it may be possible for the Charity to obtain a waiver. For further details see the Charity Commission website. |