**Trustee Skills Audit**

*This Almshouse Association template is a guide and does not constitute advice.*

A strong trustee board will have people with a mix of professional skills, personal experience and different perspectives. The ideal combination depends on your charity's purpose and strategy. Pick the skills, knowledge and experiences you need for your charity in the first column, then follow the instructions below.

A skills audit can help:

* understand your board’s current mix of skills and experience.
* identify the gaps in your board and highlight the skills you need to prioritise for your next trustee recruitment.
* this audit is also useful for succession planning and preparing for the future. It can show how the charity may be affected if a trustee leaves, or your charity faces new challenges.

Please use the following scoring system to complete the table below, complete a column for each trustee and add each trustee name into the column header. Once completed for all trustees, add up the scores in each row. The lower the score highlights the skill sets needed by the charity when recruiting.

**Scoring system**  
3 = Significant experience  
2 = Some knowledge or experience  
1 = Interested in learning more  
0 = No knowledge or experience

| **Skill / Knowledge / Experience**  *Insert or remove any skills that are or aren’t relevant to your charity* | **Trustee Name** | **Trustee Name** | **Trustee Name** | **Trustee Name** | **Trustee Name** | **SCORE**  *(total how many in this row)* |
| --- | --- | --- | --- | --- | --- | --- |
| Almshouse Knowledge |  |  |  |  |  |  |
| Board/Trustee Experience |  |  |  |  |  |  |
| Buildings & Maintenance |  |  |  |  |  |  |
| Communication, Social Media  & Marketing |  |  |  |  |  |  |
| Community Engagement & People Skills |  |  |  |  |  |  |
| Data Protection |  |  |  |  |  |  |
| Financial & Budgeting |  |  |  |  |  |  |
| Fundraising |  |  |  |  |  |  |
| Gardening |  |  |  |  |  |  |
| Health & Safety |  |  |  |  |  |  |
| Investments |  |  |  |  |  |  |
| Legal |  |  |  |  |  |  |
| Policy Development |  |  |  |  |  |  |
| Risk Management |  |  |  |  |  |  |
| Safeguarding |  |  |  |  |  |  |
| Change Management |  |  |  |  |  |  |
| Social Care System and Services |  |  |  |  |  |  |
| Almshouse Knowledge / Charity Experience / |  |  |  |  |  |  |
| Directorship / Chairpersonship |  |  |  |  |  |  |
| Information Technology |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| **Comments**  Trustees can add information here to qualify their ticks above |  |  |  |  |  |  |