

Trust Board Skills Audit

For trustees of Multi-academy trusts

Why this is important

This audit is a useful way of assessing the needs of your governing board. In the 2016 NGA/TES survey, 83% of respondents said their governing board uses a skills audit. 64% used it to identify training needs; 54% used it for recruitment; 64% used it to assign committee members; and 47% used it for succession planning. This model can be used to help identify any knowledge, experience, skills and behaviours your governing board still needs to deliver their functions effectively.

How the NGA model has changed and why

In January 2017, the DfE released a new Competency Framework for Governance, structured around the DfE's newly identified "six features of effective governance". The governance handbook 2017 states that "Boards should carry out regular audits of the skills they possess in the light of the skills and competences they need, taking account of the department's Competency framework for governance". The DfE suggest one way governing boards can use the competency framework is to inform how they carry out a skills audit.

The Competency framework has been written to cover all possible bases in school governance, from boards governing small standalone primary schools to the trust boards of large MATs overseeing the performance of multiple schools. It should be used to provide clarification of government expectations, rather than as a set prescribed checklist – but NGA is already aware of it being used as a checklist or governor job specification by some. Governing boards are best placed themselves to individually assess which areas outlined in the framework are most important for them, and so while the new skills audit is structured around the DfE's six features of effective governance, it doesn't attempt to replicate all 200 plus competencies, knowledge skills and behaviours included. Instead it combines the core aspects of the framework with the priceless experience and feedback of our members to inform the skills, experiences and knowledge included.

How to use it

To take account of differing roles of MAT trustees and those governing in other contexts, NGA has developed two separate models. **This model is to be used by MAT trustees only.** Governors, trustees and academy committee members of single schools should use our other model [here](#).

No individual is going to have all the skills listed in the audit. The governing board is a team, and the purpose of the audit is to ensure that each skill below is covered by at least one of the governors/trustees around the table. A skills matrix in which responses can be collated can be found on the NGA website. If there are any gaps, these can be used to inform further recruitment to the board.

This exercise is designed to enable all members of the governing board to set out their skills and experience whatever their backgrounds, and make clear that the essential and desirable skills for governance can be acquired through a range of life experiences. The skills and knowledge sought are those which enable governors to ask the right questions, analyse data and have focussed discussions which create robust accountability for school leaders.

Each Knowledge, experience, skill or behaviours should be rated on a scale of 1-5, with 1 indicating no experience or knowledge in this area, and 5 indicating strong expertise.



SHINE Trustee

Knowledge, experience, skills and behaviours

Level of knowledge or skills/behaviour: rate on scale of No → → → Yes

Trustee's name **INSERT NAME**

	1	2	3	4	5
1. Strategic leadership					
I am committed to improving education and welfare for all pupils.					
I understand current national education policy and the local education context.					
I have experience of charity law and governance.					
I have experience of trusteeship or management of a complex organisation with multiple sites/subsidiaries.					
I have experience of chairing a board/governing board or committee.					
I am committed to the organisation's vision and ethos.					
I have experience of strategic planning and applying this to set and preserve the culture of the organisation.					
I have experience of working with executive leaders to agree and monitor operational plans.					
I am able to question and challenge, working as part of a team to identify viable options through collective decision making.					
I am able to work in a professional manner, avoiding conflicts, acting with transparency and integrity.					
I am confident I can identify when to seek independent/professional advice.					
I have experience of stakeholder management and engagement including communicating with and taking account of the views of parents and pupils.					
I have experience of promoting community cohesion.					
I understand school sector risk management including conflicts of interest/loyalty.					
I am proficient in prioritising, assessing and mitigating risk.					
I have experience of agreeing organisation expansion plans and conducting due diligence on other organisations prior to signing a legally binding contract.					
2. Accountability					
I understand the importance of collecting high quality data and have expertise using data to interpret/evaluate performance and identify trends to target improvement.					
I have experience of curriculum development, school assessment and progress/attainment.					
I have experience of working with executive leaders to establish expectations for improvement and outcomes.					
I have experience of agreeing the range and format of information and data needed in order to hold leaders to account.					
I have experience of providing challenge to leaders on strategies for monitoring and improving behaviour and safety.					
I understand the board's duties in relation to safeguarding including Prevent.					
I have an understanding of special education needs and disabilities (SEND).					



I have financial management expertise including funding allocation/budget monitoring, and financial solvency. I am able to contribute to financial self-evaluation and efficiency drives.					
I have experience of basing funding decisions on organisational priorities and the ability to interpret financial data and question financial performance against strategic priorities.					
I have experience ensuring that organisational financial obligations are met and adequate financial controls are in place, including submission of annual returns and accounts.					
I have business development experience/expertise.					
I have experience of procurement/purchasing.					
I have experience of property and estate-management.					
I have experience of HR policy and processes including employment legislation, executive recruitment, performance management and pay.					
I have experience of school sector HR policy and processes.					
I have experience of change management (overseeing a merger or an organisational restructure).					
I have experience of marketing, media and PR.					
I have experience of preparing for and responding to external oversight.					
I have experience of inspection and oversight in the school sector.					
3. People					
I am willing to devote time, enthusiasm and effort to the duties of and responsibilities of a trustee including duties of compliance, care and prudence.					
I'm a strong communicator and experienced in building strong collaborative relationships.					
I am able to discuss sensitive issues with experience of conflict resolution and influencing consensus.					
I am able to demonstrate a commitment to ethical behaviour and values, honesty, independence of thought and sound judgement.					
I am committed to equal opportunities and the promotion of diversity.					
I am willing to reflect, listen and learn from a diversity of views, to receive and provide feedback and accept impartial advice.					
4. Structures					
I am familiar with the strategic nature of the board's functions and how this differs from and works with others including executive leaders and academy or regional committees.					
I have experience of designing/reviewing/adapting governance structures appropriate to the size and complexity of the organisation, reflecting the diversity of stakeholders.					
5. Compliance					
I have you have experience of complying with legal, regulatory and financial frameworks and statutory guidance.					
I understand and accept the legal duties, responsibilities and liabilities of trusteeship.					
Governing boards are responsible for ensuring schools comply with a whole range of legal responsibilities. I have experience ensuring legal compliance in this way and a commitment to understanding the full range of legal responsibilities.					
I understand the importance of adhering to organisation policies e.g. on parental complaints or staff discipline issues.					
I am able to speak up when concerned about non-compliance.					
6. Evaluation					
I am aware of my own strengths and weaknesses and committed to personal development.					
I have experience evaluating board decisions and am willing to contribute to board self-review.					



What contribution do you feel you have made (or can make) to the Trust Board over the past (or next) year?

Please give brief details of courses you have undertaken in the past year - include trustee training, work based training/development and/or any other development/training activities.

Are there any additional areas of the Trust board's responsibilities to which you would like to contribute in the future or require support/training?

