

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:		
<i>Please indicate if you have skills or knowledge or qualifications in the following areas (tick those that apply):</i>	Interested	Some Knowledge	Expert
Core trustee activities:			
Leadership & senior management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Governance/trustee responsibilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial/ book keeping/ accounting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Property management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business/Strategic planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Risk management and insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal - Charity Law; Company Law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Committee procedures/ chairing meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Equalities & valuing diversity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Networks/ alliances /influence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Knowledge of the community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising/income generation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safeguarding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HR/Employment Law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other areas:			
Campaigning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Policy implementation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Project management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Computers & Information technology including Cyber Security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health & Safety	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Management/ management systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conflict resolution/ relationship management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expertise relating to client group/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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 <input type="checkbox"/>	No <input type="checkbox"/>
Duty of prudence	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Duty of care	Yes <input type="checkbox"/>	No <input type="checkbox"/>

If not, please read “The Essential trustee” (CC3a) on the Charity Commission website and the Charity Code of Governance at your earliest convenience and discuss this with your Chair.

Are you eligible to be a trustee? Please confirm that none of the following apply to you:

You must not act as a trustee if you are disqualified, unless authorised to do so by a waiver from the Commission.

The reasons for disqualification are shown in the disqualifying reasons table and include:

- being bankrupt (undischarged) or having an individual voluntary arrangement (IVA)
- having an unspent conviction for certain offences (including any that involve dishonesty or deception)
- being on the sex offenders’ register

You can read the [automatic disqualification guidance for charities](#) which explains the disqualification rules in more detail. There are further restrictions for charities that work with children or adults at risk.