

Trustee Skills Audit Autumn 2024

The Skills Audit was sent out to all trustees asking them to rate their experience against a list of skills as follows:

- No knowledge/ experience
- Some knowledge/ experience
- Good current hands-on experience
- Expert

They were also asked to state whether they consider a skill to be “essential” or “desirable” to a Trustee Board.

Six out of eight trustees completed the questionnaire.

The intention for this exercise is to identify skills gaps; decide what expertise is essential for our Board; and use this information to inform trustee recruitment moving forwards.

The results were (lightly and informally) analysed and assigned a colour using the traffic light system. Red being where there is no or very little experience; amber reflects those areas with “some” knowledge; and green is where we feel we have good levels of experience and no concerns.

I have listed below the skills and, where appropriate, the rationale for their traffic light rating.

Red

- **Enterprise/ Business Development** – considered an essential skill by respondents but we only have one person rating themselves “good”, with the rest either no or some knowledge
- **Entrepreneurship** – mainly no experience with just one “expert”. Not considered an essential skill by respondents
- **Legal** – predominately no knowledge on the Board but not considered an essential skill
- **Marketing & Communications** – An overview is important but not sure this is essential for trustees? Probably not a priority
- **Political and Parliamentary** – Again, very little experience on the Board but given that we have tended to remain neutral on contentious political matters an overview is probably sufficient at this time?
- **Regeneration Leadership** – In a nutshell, this is a leadership style that takes a holistic view, emphasising sustainability, collaboration and resilience, for example. I would say that we are well on the way to doing this as an organisation and probably need it to be part of our ethos rather than people’s skills sets?
- **Digital Marketing** – Again, like marketing and communications an overview is sufficient.

Amber

- **Buildings/ Facilities Management** – This is likely to become more important over time for historic buildings
- **Financial, especially Charity Accounting** – We have some experience on the Board but there is room to improve!
- **Fundraising** – Most respondents had some knowledge; the gap is probably more for oversight than in-depth knowledge of applications at this time
- **Human Resources/ Training** – Some knowledge on the Board but potentially need some succession planning for interviews etc. We do have a HR consultant and the CEO is responsible for recruitment
- **Impact, Monitoring and Evaluation** – Requires an oversight rather than an in-depth knowledge because we tend to use external evaluation companies for large projects
- **Information Technology and Systems** – Desirable skill but we have an IT support contract for day-to-day
- **Property Management** – Depends how this question is interpreted. We have good levels of understanding of sites management on the Board
- **Strategic Influencing and Advocacy** – Considered to be an essential skill, in which case we have a good level of understanding
- **Strategic Planning** – Again considered to be an essential skill where we have some knowledge and experience on the Board
- **Training & Skills Development** – Some level of expertise which is acceptable given that this is probably covered by education
- **Capital Project Delivery** – Some knowledge, don't currently have a project planned
- **Ecology & Biodiversity** – Some knowledge, potentially room for an expert?
- **Experience of Funders such as NLHF etc** – Some knowledge, fundraising is definitely a gap
- **Land Management** – Again, this depends on interpretation of the question. Could potentially be included in someone with an ecology background?

Green

- Customer/ Member Care
- Equality and Inclusion – Good knowledge level BUT the Board does not reflect a diverse group
- Experiencing of chairing a Board or Committee
- Experience of serving as a Trustee or Director of another organisation
- Governance
- Leadership and/or Senior Management
- Networks/ Alliances/ Partnerships
- Organisational Development inc. Change Management
- Volunteer Management and Operations
- Conservation of Built Heritage
- Conservation of Historic Landscape
- Knowledge/ experience of statutory bodies e.g. Historic England or Natural England
- Project/ Programme Management
- Composition of written material e.g. interpretation, reports etc

- Education
- Historian/ Archaeologist
- Presentation of Heritage e.g. talks, walks etc

Priorities

When deciding which skills should be prioritised the following could be considered:

- Do we currently have adequate skills within our Trustee Board to carry out the trustees' role as defined by the Charity Commission?
 - *Ensure your charity is carrying out its purposes for the public benefit*
 - *Comply with your charity's governing document and the law*
 - *Act in your charity's best interests*
 - *Manage your charity's resources responsibly*
 - *Act with reasonable care and skill*
 - *Ensure your charity is accountable*
- Which skills are essential and which are desirable
- Do we, or can we, buy-in expertise for specific areas? E.g. Capital project delivery where a trustee's role would be to provide the strategy and challenge rather than actually manage a project. In this case we would employ a Project Manager etc to report to the Board
- Are there skills that are provided by members of staff which provide sufficient expertise, even if only for the short term while other priorities are dealt with? E.g. Marketing is covered by Grace and Alison with the assistance of Jamie. It is probably a low priority to recruit a trustee with these skills at present
- Are there plans to recruit staff who may fulfil a skill area?
- Will a skill be required imminently? E.g. We don't have a substantial capital project planned at present and so delivery experience may not be required in the near future.

Recommendations

Considering the results of the poll alongside the responsibilities of a Trustee Board I would prioritise the following skills sets for trustee recruitment moving forwards:

- **Financial** – We have been advertising for a trustee with accountancy experience for some time and I think it is still important to provide challenge and insight
- **Fundraising** – We are not looking for someone to write applications, but an experienced critical friend with previous strategic responsibility for fundraising would be beneficial
- **Ecology, Biodiversity and Land Management** – More and more of our work with the sites focuses on how to manage the land and so someone with ecological land management experience would be helpful. We obviously have well-trained staff and so this person would complement the team and provide a sounding-board
- **Legal** – While trustees did not consider this an “essential” skill for the Board I think a trustee with legal expertise would be invaluable given that trustees (and directors) are legally responsible for a charity's management and administration

Actions by Trustees

Trustees to consider the above list of recommended skills and to decide whether there are any others which they would like to add to the priority list.

Cathy Woolcock
November 2024