

# Excel Academy Partnership - Trust Board Skills Audit

## For existing and new trustees

### Why this is important

This audit is a useful way of assessing the needs of our Trust Board. The Excel Academy Partnership will analyse this data annually to identify training needs; to support recruitment; to assign committee members; and to support succession planning. This matrix will be used to support The Excel Academy Partnership in identifying any knowledge, experience, skills and behaviours the Trust Board still needs to deliver its functions effectively.

## DfE Competency Framework

The [Competency Framework](#) is designed to help Trust Boards assess what knowledge, skills and behaviour are needed to govern the school, or group of schools, most effectively. It is organised into blocks of ‘who needs to have this’. There are some skills or knowledge that the DfE thinks everyone on the board needs to have, and others that the chair or ‘at least someone’ on the board will need to have. The Framework is made up of 16 competencies which are grouped under the headings of the ‘six features of effective governance’, which are detailed in the [Governance Handbook](#). These are Strategic leadership; Accountability; People; Structures; Compliance; Evaluation.

## The model

This skills matrix mirrors the model made available by the National Governor Association, which is based on the DfE Competency Framework. It is therefore structured around the “six features of effective governance” as detailed above. The governance handbook also emphasises 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”.

### How to use it

No individual is going to have all the skills listed in the audit. The Trust 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 Trustees around the table.

This exercise is designed to enable all members of the Excel Academy Partnership Trust 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 Trustees 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.

Trustee Name: \_\_\_\_\_ Date Completed: / /

Excel Academy Partnership – Assessment of Knowledge, experience, skills and behaviours	Level of knowledge or skills/behaviour, rate on scale of: No → → → Yes				
	1	2	3	4	5
<b>1. Strategic leadership</b>					
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 previous experience of being a governor/trustee in another school or being a board member in another sector.					
I have experience of chairing a board/governing or Trust board, or committee.					
I have experience of strategic planning and applying this to set and preserve the culture of the organisation.					
I am committed to the organisation's vision and ethos.					
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 am proficient in prioritising, assessing and mitigating risk.					
I have experience of school sector risk management, including managing conflicts of interest/loyalty.					
<b>2. Accountability</b>					
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 expertise in curriculum development, school assessment and progress/attainment.					
I have experience of working with 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 have an understanding of 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, with experience of funding allocation/budget monitoring and contributing 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 of procurement/purchasing.				
I have experience of property and estate-management.				
I have experience of HR policy and processes, including employment legislation, 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 preparing for and responding to external oversight.				
I have experience of inspection and oversight in the school sector.				
<b>3. People</b>				
I am willing to devote time, enthusiasm and effort to the duties of and responsibilities of a trustee.				
I am a strong communicator and committed to 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.				
<b>4. Structures</b>				
I am familiar with the strategic nature of the board's functions and how this differs from and works with others including senior leaders.				
I have experience of reviewing governance structures.				
<b>5. Compliance</b>				
I have experience of complying with legal, regulatory and financial frameworks and statutory guidance.				
I understand and accept the legal duties, responsibilities of a trustee.				
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 have the confidence and ability to speak up when concerned about non-compliance.				
<b>6. Evaluation</b>				
I am aware of my own strengths and weaknesses and committed to personal development.				
I have experience of evaluating board decisions and am willing to contribute to board self-review.				

**Existing Trustees only**

What contribution do you feel you have made to the Trust Board over the past year?

Please give brief details of courses you have undertaken in the past year - include governance/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?

Name: \_\_\_\_\_

Date Completed: \_\_\_\_\_