Leadership Skills Audit

Introduction

This skills audit can be used to spot any gaps in the leadership team, rather than focusing on individuals. The audit doesn’t have to be anonymous, but any information collected should be handled with care. Make sure everyone is comfortable with the plan before moving forward.

Using the Audit

Review the skills and experience listed, and delete any that aren't relevant to your organisation’s context. Add any skills, knowledge, or experience you think are missing. Consider what your leadership team needs to effectively govern the organisation, keeping its current and future strategic objectives in mind. For each skill decide your level of experience from the options provided and tick the appropriate column, but feel free to add more detail. Once you've reviewed the findings, note any key skills missing from the leadership team. This will help you identify what additional skills, knowledge, or experience you might want to recruit. The results of this audit can be used in your recruitment process, when speaking to potential individuals, or added to the role description. It could also help shape a learning and development plan for your current leadership team.

The Audit

|  |  |  |  |
| --- | --- | --- | --- |
| Skills/knowledge | I have lots of experience | I have some experience | I have no experience |
| Audit |  |  |  |
| Business Management |  |  |  |
| Business Planning |  |  |  |
| Campaigning & Influencing |  |  |  |
| Change Management |  |  |  |
| Collaborative Working |  |  |  |
| Conflict Management |  |  |  |
| Contract Management |  |  |  |
| Data Management |  |  |  |
| Data Protection |  |  |  |
| Engaging Stakeholders |  |  |  |
| Equality, Diversity & Inclusion |  |  |  |
| Event Management |  |  |  |
| Financial Management |  |  |  |
| Governance |  |  |  |
| Health & Safety |  |  |  |
| ICT Management |  |  |  |
| Impact Management |  |  |  |
| Income Generation & Fundraising |  |  |  |
| Investment Management |  |  |  |
| Marketing & Communications |  |  |  |
| Membership Management |  |  |  |
| Monitoring & Evaluation |  |  |  |
| Operational Management |  |  |  |
| Partnership Working |  |  |  |
| People Management |  |  |  |
| Performance Management |  |  |  |
| Policy Development |  |  |  |
| Project Management |  |  |  |
| Property Management |  |  |  |
| Quality Assurance |  |  |  |
| Regulation & Law |  |  |  |
| Risk Management |  |  |  |
| Safeguarding |  |  |  |
| Strategy Development |  |  |  |
| Trading |  |  |  |
| Training Development |  |  |  |
| Volunteer Management |  |  |  |

Personal Development Planning  
In addition to identifying skills gaps within the leadership team, it’s important to reflect on your personal development as a trustee or leader. Use the table below to note any skills or knowledge areas from the audit that you would like to develop personally. This can guide your own learning and help you become a more effective contributor to the board.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Skills/knowledge | Current level of experience | Development goal | Action plan | Timeframe |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

Prioritising Critical Skills

Not all skills are equally critical at every stage of your charity’s development. As a team, discuss and identify the top 5 skills or knowledge areas that are most important for your charity right now, considering your strategic objectives and challenges. This will help focus efforts on recruitment, training, or development.

|  |  |  |
| --- | --- | --- |
| Skills/knowledge | Why this skill is critical now | Next steps |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

A group of colorful circles

AI-generated content may be incorrect.Annual Skills Audit Review  
This audit should be revisited on an annual basis to track the leadership team’s progress and address any emerging needs. Use the space below to summarise the findings of each year’s audit and note any major changes in the organisation’s skill requirements.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Year | Summary of audit findings | Key skill gaps | Action plan | Progress made |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

💡*Need more support?*

Wirral CVS is here to help your organisation grow, develop and succeed. Whether you’re just starting out or strengthening your foundations, our Development Team can provide one-to-one guidance, training, resources and advice tailored to your needs.

Contact us to book a support session

**📧 Email:** *info@wirralcvs.org.uk*

**📞 Phone:** *0151 433 3371*

**🌐 Website:** *www.wcvs.org.uk*

📄 *More resources available at:*

[**www.wcvs.org.uk/support**](https://wirralcvs-my.sharepoint.com/personal/lewis_hall_wcvs_org_uk/Documents/Documents/Support%20Documents/www.wcvs.org.uk/support)

Including templates, guidance and policy tools across governance, finance, safeguarding, volunteering and more.

ℹ️*Disclaimer*

A group of colorful circles

AI-generated content may be incorrect.[**www.wcvs.org.uk/support**](https://wirralcvs-my.sharepoint.com/personal/lewis_hall_wcvs_org_uk/Documents/Documents/Support%20Documents/www.wcvs.org.uk/support)

This document is provided for general guidance only. It does not constitute legal advice. We recommend seeking professional support where required.

A logo with colorful circles

AI-generated content may be incorrect.