

[Insert museum name] is undertaking a skills audit of its trustees, to help develop the Trustee Board so they can work more effectively with the private sector (e.g. for fundraising, corporate partnerships or in-kind support). This audit will identify the museum’s skills and knowledge in the following areas:

- Governance (to demonstrate competence and inspire confidence in funders/partners)
- Fundraising/advocacy with the private sector
- Leading the museum as a whole (including staff and volunteers) to work/fundraise effectively with the private sector

The results of the audit will be used to:

- Identify trustees with the skills and knowledge to lead the Board in fundraising/working with the private sector, as part of a board sub-committee
- Identify and address any gaps in the skills/knowledge of the Board (e.g. through training or recruiting new trustees or advisors to the board)

**How to use this audit**

This is a self-assessment audit, so please rate your own skills and experience in each of the following sections. Use these definitions to help.

Rating	What does it mean?
Highly skilled/experienced	E.g. You have done this as a significant aspect of your work for a considerable amount of time and/or you have had comprehensive training in this area.
Competent	E.g. You have done this as a minor aspect of your work for a reasonable amount of time. You may have had some training.
Not skilled/experienced	E.g. Your work (paid or voluntary) has never involved this area.
Would like training	This is something you would like to learn more about to help you in your work as a Trustee.

Remember to consider the skills and experiences you have gained in different parts of your life (volunteering, hobbies), as well as those gained during working life. It is also worth considering how current your experience/knowledge is. For example, if you have been highly skilled/experienced in a certain field, but not been active in this area for 5 or more years, you could tick both ‘Highly Skilled’ and ‘Would Like Training’ if you think you would benefit from updating your skills/experience in this area.

**Confidentiality**

[Insert information about your approach to confidentiality here. As a general rule, results should only be reported anonymously, so that individuals are not identifiable from the results. This section should also make it clear how and with whom the results will be shared.]

<b>Name</b>	
<b>Occupation</b>	
<b>Reasons for joining Board</b>	

## Board governance

<b>KNOWLEDGE</b>	<b>Highly knowledgeable</b>	<b>Competent</b>	<b>Not knowledgeable</b>	<b>Would like training</b>
Understanding of trustee role and responsibilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understanding of legislation/regulations for charity boards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>SKILLS/EXPERIENCE</b>	<b>Highly skilled/experienced</b>	<b>Competent</b>	<b>Not skilled/experience</b>	<b>Would like training</b>
Budget management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial accounting and controls	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Succession planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Board performance management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Policy development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Strategic planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advocacy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Fundraising/advocacy

<b>KNOWLEDGE</b>	<b>Highly knowledgeable</b>	<b>Competent</b>	<b>Not knowledgeable</b>	<b>Would like training</b>
Connections with local businesses/individuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Connections with businesses/individuals with relevance to the museum's collection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>SKILLS/EXPERIENCE</b>	<b>Highly skilled/ experienced</b>	<b>Competent</b>	<b>Not skilled/ experience</b>	<b>Would like training</b>
Internet research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spreadsheet or database creation and management (to record funders/partners and track contact with them)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Writing bids/proposals (to develop a Case for Support for why funders should give to the museum)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project management (to produce a prioritised action plan for fundraising/working with the private sector)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Presentation (for explaining your Case for Support with funders/partners)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Negotiation (for agreeing deals with funders/partners)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>ATTRIBUTES</b>	<b>Highly skilled/ experienced</b>	<b>Competent</b>	<b>Not skilled/ experience</b>	<b>Would like training</b>
Self-confidence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resilience (being able to take knock backs!)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Persistence (to follow-up with approaches to businesses/individuals)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### **Leading fundraising**

<b>KNOWLEDGE</b>	<b>Highly knowledgeable</b>	<b>Competent</b>	<b>Not knowledgeable</b>	<b>Would like training</b>
Understanding of staff & volunteer motivations/needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understanding of volunteer management best practice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SKILLS/EXPERIENCE	Highly skilled/ experienced	Competent	Not skilled/ experience	Would like training
Coaching (building self-confidence to encourage staff/volunteers to contribute)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identifying training needs for staff/volunteers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building rapport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Informal presentation (to share plans with staff/volunteers)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recognition (thanking people for their contribution)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Taking into consideration your other responsibilities as a trustee and in your working and personal life, do you have the time to do any of the following?**

	Yes	No
Be a member of a sub-committee to lead on fundraising/working with the private sector	<input type="checkbox"/>	<input type="checkbox"/>
Approach one or more businesses or individuals to ask for fundraising/in-kind support for the museum	<input type="checkbox"/>	<input type="checkbox"/>

**What do you think are the main challenges for the museum in approaching the private sector for fundraising or support?**

**What, if anything, would you need to feel confident in approaching a business or an individual for fundraising or support for the museum?**

**Thank you for taking the time to complete this questionnaire.**