

How to use the NGA skills audit and skills matrix

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National Governance Association

The National Governance Association (NGA) is the membership organisation for governors, trustees and clerks of state schools in England.

We are an independent, not-for-profit charity that aims to improve the educational standards and wellbeing of young people by increasing the effectiveness of governing boards and promoting high standards. We are expert leaders in school and trust governance, providing information, advice and guidance, professional development and e-learning.

We represent the views of governors, trustees and clerks at a national level and work closely with, and lobby, UK government and educational bodies.

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This guide covers:

- the purpose of the skills audit and matrix
- considerations before you get started
- how to complete the skills audit
- how to complete the skills matrix
- using the skills audit to create a development plan

The purpose of the skills audit and matrix

Effective governance requires a board with a range of skills, together with a diversity of experience, backgrounds, characteristics and perspectives. These skills, experiences and knowledge enable governors to ask the right questions and have discussions which create robust accountability for school leaders.

The NGA skills audit and skills matrix tools are designed to help boards evaluate their collective knowledge, skills and behaviours. These tools will help the governing board consider ways of improving its capacity and effectiveness through recruitment, ongoing development and support.

Before you get started, decide:

1. *Who will collate and evaluate responses?* This could be delegated to an individual governor (e.g. the governor linked to board CPD), a small working group of governors or the clerk. We recommend that the chair and headteacher are not involved in this task given other demands on their time.
2. *When will the evaluation of responses be fed back to the governing board?* This process should be completed at the start of each academic year. New governors should also complete the skills audit on joining the board.
3. *How will the evaluation of responses be reported to the governing board?* The completed skills matrix will likely reveal gaps in the board's skills and knowledge. A summary of identified areas for improvement should be reported to the board, together with a plan to develop these areas on an individual or group basis.

Completing the skills audit

- The skills audit comprises six categories: strategic leadership, accountability, people, structures, compliance and evaluation. The audit is based on the [DfE's Competency Framework for Governance](#).
- When asking individuals to complete the skills audit, be clear about the purpose of the activity and what will happen to their responses.
- Individuals completing the skills audit rate their agreement with a set of statements on a scale of 1-5, with 1 indicating no experience or knowledge in this area, and 5 indicating strong expertise.
- Those completing the form should be encouraged to give honest responses to ensure the board builds an accurate picture. Keep in mind that no individual board member is expected to have all the skills listed in the audit, they should be covered across the governing board.
- The skills audit also includes an opportunity for governors and trustees to reflect on their contribution to the board. Responses to these questions can be used alongside the skills audit evaluation and to support annual governor performance reviews.

Completing the skills matrix

Individual governor skills audit scores should be entered into the skills matrix. The completed skills matrix provides an overview of the board's collective strengths and highlights areas where further development is needed.



When completed, the skills audit calculates an overall average score for the board for each competency:

	Desirable or essential?	Overall	Trustee A	Trustee B	Trustee C	Trustee D	Trustee E	Trustee F	Trustee G	Trustee H	Trustee I	Trustee J	
1. Strategic leadership													
1	I am/have been a trustee or governor in another school or board member in another sector.	D	3	4	2	2	4	5	1	3	2	2	2
2	I have experience providing oversight of a complex organisation with multiple sites	E	3	5	4	4	4	3	2	2	2	3	3
3	I am/have been chair of a board or committee	D	2	1	1	1	4	5	1	1	1	1	2
4	I have an awareness of national education policy (e.g. school funding, curriculum, teaching and learning)	E	4	4	4	5	3	4	3	2	4	4	3
5	I have experience of communities local to schools within the trust	E	4	4	4	5	5	4	3	4	4	2	2
6	I understand the difference between strategic and operational decisions	E	4	5	4	5	5	4	3	4	4	4	2
7	I have experience and expertise in strategy development	E	3	4	3	3	5	4	3	4	2	3	2

Questions to ask when reviewing the skills matrix:

- do responses match expectations?
- are there any implications for our role description or code of conduct?
- do any of the responses have implications for our recruitment strategy?
- do any of the responses raise questions about our induction strategy?
- are the lower scoring competencies issues that could be dealt with by training?
- could we improve any of the lower scoring competencies by mentoring and coaching?
- do we need to review our committee membership based on these responses?
- are there any implications for succession planning?

Creating a development plan

- A development plan is a simple document that details any actions that may be necessary to build knowledge, skills and behaviour in priority areas.
- Priority areas are those that will have the most impact and are relevant to the board at this time.
- The skills matrix indicates whether each area is essential or desirable. If the board scores below three in an essential area, this should be a priority for improvement.
- Decide on the actions required to address the areas for development, considering:
 - recruitment
 - training
 - appointing associate members or advisors
 - mentoring and coaching (formal and informal)
 - [NGA's learning link](#) gives access to over 50 interactive online training modules to help develop governance skills and knowledge



It may be useful to separate the list into actions for individual governors and those for the board:

Example of an action arising for an **individual governor** following evaluation of the skills matrix:

Proposed action	Why has this been proposed?	What will it achieve?	What will it cost?	Who will lead on this?	When will it be completed
Apply for a place on NGA Leading Governance Chairs' programme	Aspiring chair (currently vice chair) has skills audit score of 3 for experience of chairing a governing board or committee	Will start to build required knowledge and skills and facilitate / support future development	Full cost of the programme is £500. Funding for the full cost available subject to availability	Clerk will enquire about local availability and dates Vice-chair will book their place and confirm	Within 12 months

Example of an action arising for the **governing board** following evaluation of the skills matrix:

Proposed action	Why is this been proposed?	What will it achieve?	What will it cost?	Who will lead on this?	When will it be completed
Recruit a co-opted governor with experience of financial planning within school sector	Skills matrix scores the governing board as 2 out of 5 in this essential area Limited scope to address through training	Expected that the new co-opted governor will join the finance committee and contribute towards the school's 3-year financial plan	No financial cost Time allocation of approximately 3-4 hours dependent upon the response	Vice-chair to contact local school business managers and governance association Clerk to advertise vacancy on Inspiring governance platform	By the end of the academic year Update on progress to be given by the vice chair and clerk

Further reading

NGA has a range of guidance available from the [NGA Knowledge Centre](#) that is suitable for boards evaluating their effectiveness. Relevant guidance includes:

- [The right people around the table: a guide to recruiting and retaining school governors and trustees](#)
- [What governing boards and school leaders should expect from each other](#)
- [Model role descriptions for chairs, governors, trustees and clerks](#)
- [Creating the right dynamics: a guide to help governing boards work effectively as a team](#)

Further support

NGA offers [support and e-learning for school governance](#). All NGA training is interactive and offers engaging learning.

NGA consultancy offers a range of [consultancy support for governing boards](#), varying the approach according to the individual requirements of your school organisation.