

Trustee knowledge audit

September
2024



Confederation
of School Trusts

The voice of school trusts

Trustee knowledge audit

Introduction

This rapid audit tool for trustees provides a way for trustees to self-assess their understanding, using CST's [Assurance framework for trust governance](#) as a base.

It can be especially helpful for new or recently appointed trustees to reflect on their knowledge and identify where there may be gaps to be addressed, to help them better discharge their duties.

Governance professionals can use it to help conduct a knowledge audit and target training and resources to help with board development and effectiveness.

About this tool

This tool was originally published in May 2022, republished in March 2023 as an interactive PDF and reviewed in September 2024. The form can be filled in electronically and saved for return to trust governance professionals, or printed out for completion on paper.

Board leadership

Question	Response and notes	
1. I know and understand my trust's strategic plan and can explain what my trust's strategic priorities are	Strongly agree	Strongly disagree
2. I know and understand my duties as an employer	Strongly agree	Strongly disagree
3. I know the regulatory requirements about conflicts of interest and related party transactions, including when to disclose these	Strongly agree	Strongly disagree
4. I know and can explain the mechanisms in place for parent and community engagement	Strongly agree	Strongly disagree

Question	Response and notes	
5. I know and can explain how the impact on key stakeholders has been taken into account in decision-making	Strongly agree	Strongly disagree
6. I know and can explain the difference between my non-executive role and that of the executive team	Strongly agree	Strongly disagree
7. I know and embrace the Principles of Public life in everything I do in my governance role	Strongly agree	Strongly disagree

Structures

Question	Response and notes	
8. I know and understand my trust's governance structure	Strongly agree	Strongly disagree
9. I have a good working knowledge of my trust's scheme of delegation	Strongly agree	Strongly disagree
10. I know and can explain the respective roles and responsibilities of those in the governance structure, including the legal role of trust members	Strongly agree	Strongly disagree
11. I know and understand the principle of significant separation	Strongly agree	Strongly disagree

Question	Response and notes	
12. I know and can explain the mechanisms that are in place to ensure good communication between the tiers of governance	Strongly agree	Strongly disagree
13. I know my trust's process for trustee recruitment and am assured that these are compliant with the trust's articles of association	Strongly agree	Strongly disagree

Accountability

Question	Response and notes	
14. I have sufficient knowledge about published data and assessment data to test the underlying assumptions of the executive team and to be able to challenge effectively	Strongly agree	Strongly disagree
15. I know and can explain my trust's approach to school improvement and have a good working knowledge of improvement across our group of schools	Strongly agree	Strongly disagree
16. I know and understand the financial policies and procedures of my trust including the mechanisms for ensuring financial accountability	Strongly agree	Strongly disagree
17. I know and understand the internal control processes to ensure propriety and value for public money	Strongly agree	Strongly disagree

Question	Response and notes	
18. I have sufficient knowledge of procurement to be able to test that spending and procurement decisions are compliant and well-managed	Strongly agree	Strongly disagree
19. I know and can explain the financial health of my trust and my trust's 3–5-year financial plans	Strongly agree	Strongly disagree
20. I know and can explain the trust's approach to risk and can articulate the top risks affecting us	Strongly agree	Strongly disagree
21. I know and can explain my trust's process for making decisions about remuneration, our pay policy and our approach to executive pay	Strongly agree	Strongly disagree

Question	Response and notes
<p>22. I know and understand the purpose, nature and processes of formal accountability and scrutiny, including audit, regulation, and inspection and I am confident that my board acts on these</p>	<div>Strongly agree</div> <div>Strongly disagree</div>

Compliance

Question	Response and notes	
23. I know and understand my duties and responsibilities under charity law and company law, and I am cognisant of my duty to act within powers	Strongly agree	Strongly disagree
24. I have read and I understand the key governance documents for my trust, the funding agreement(s) and articles of association	Strongly agree	Strongly disagree
25. I know when to seek external advice	Strongly agree	Strongly disagree
26. I know and understand the controls in place in relation to regularity, propriety and value for money	Strongly agree	Strongly disagree

Question	Response and notes	
27. I know and understand my legal responsibilities for safeguarding	Strongly agree	Strongly disagree
28. I know and understand my legal responsibilities for health and safety	Strongly agree	Strongly disagree
29. I know how to exercise care, skill, and diligence in relation to my governance role	Strongly agree	Strongly disagree
30. I put the charitable object of advancing education for public benefit at the heart of my governance responsibilities, recognising that my governance role means that I hold a bond of trust with children	Strongly agree	Strongly disagree



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Suite 1, Whiteley Mill
39 Nottingham Road
Stapleford
Nottingham
NG9 8AD

0115 9170142

cstuk.org.uk

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