**Chief executive officer skills audit**

Use this skills audit to identify current strengths and areas for development. Individual trusts will vary; adapt the audit accordingly.

| **Proficiency** | **Criteria** | **Experience/expertise level** | | | | **Notes: self-assessment of skill and actions to take** |
| --- | --- | --- | --- | --- | --- | --- |
| Experienced and competent | An area for self-development | Support needed to develop | No experience or competence |
| **Leading strategic direction** | Work with the board and stakeholders to develop the vision, plans and budgets to show how the trust will progress towards its strategic goals each year. |  |  |  |  |  |
| Ensure that values, ethos and vision are communicated and delivered across the trust. |  |  |
| [Provide the overall leadership and direction](https://my.optimus-education.com/planning-strategic-improvement-mat-ceo) to the trust within the agreed vision and strategy. |  |  |
| Ensure the [finances and governance](https://my.optimus-education.com/eight-top-tips-support-your-trusts-financial-compliance) of the trust operate to the highest standards. |  |  |
| Work with the board on the trust’s overall strategy and the effectiveness of its educational performance. |  |  |
| Be future focused with the ability to scan the horizon, identifying emerging issues, risks and opportunities. |  |  |
| **Leading on ensuring accountabilities are met** | Hold the executive headteacher/heads of school to account for the educational performance of the school and its pupils, and the [performance management of staff](https://my.optimus-education.com/performance-management-and-appraisal-strategies-and-guidance). |  |  |
| Act as the accounting officer, in line with the Academies Trust Handbook. |  |  |
| Ensure the highest levels of transparency and governance in the education, corporate and financial affairs of the trust. |  |  |
| Advise the trust board on their agreement of the proposed budgets and plans for the trust. |  |  |
| Be able to create systems that support succession planning and ensure accountability at all levels. |  |  |
| Ensure [educational and financial performance](https://my.optimus-education.com/how-can-mats-develop-high-performance-culture) is effectively managed and meets all statutory requirements. |  |  |
| Manage day-to-day operations and ensure an effective strategy for building educational and leadership capacity. |  |  |
| **Leading on relationships management** | Develop and maintain strong relationships with the DfE, regional school commissioners, local authorities, headteachers and governing bodies. |  |  |
| Ensure collaboration with key personnel and effective sharing of knowledge. |  |  |
| Identify and secure partnerships with external agencies, individuals and groups that could benefit the trust. |  |  |
| Be able to build and maintain a culture that is shared across the trust. |  |  |
| [Manage the reputation of individual academies](https://my.optimus-education.com/how-market-school-values-and-culture) and the trust by building strong community links. |  |  |
| Be an active ambassador and champion of the trust. |  |  |
| **Leading on strategic trust growth and expansion** | Coordinate applications for the transfer of new schools into the trust. |  |  |
| Assess and manage risk when [building capacity for growth](https://my.optimus-education.com/expanding-your-multi-academy-trust). |  |  |
| Ensure [robust due diligence](https://my.optimus-education.com/due-diligence-checklist-and-questions-ask) and risk assessment is carried out and present applications to the board for consideration. |  |  |
| Ensure that academies joining the trust have appropriate staffing, governance, reporting and curriculum structures in place. |  |  |
| Manage new acquisitions to ensure compliance with requirements. |  |  |
| Ensure appropriate and timely project management is in place to achieve a smooth transition. |  |  |
| **Leading pupil achievement across the trust** | Ensure the trust consistently achieves outcomes for all pupils in line with the trust’s strategy. |  |  |
| Maintain oversight to ensure the highest standard of educational provision across the trust. |  |  |
| Review progress, development and educational performance across the trust. |  |  |
| Analyse and interpret a range of information to judge effectiveness of individual academies and the whole trust. |  |  |
| Maintain and review the curriculum offering to ensure appropriate breadth, depth and sustainability. |  |  |
| Ensure school leaders across the trust deliver a consistent strategy, [regularly sharing and reviewing best practice](https://my.optimus-education.com/10-ways-headteachers-collaborate-across-mat). |  |  |
| **Leading on robust financial performance of each school and the trust overall** | Ensure robust financial management based on accurate analysis, optimal use of resources and sufficient [income generation](https://my.optimus-education.com/topic/income-generation) to meet development needs. |  |  |
| Establish [effective financial systems](https://my.optimus-education.com/budget-forecasting-single-and-multi-academy-trusts) and controls that identify risks to the finances of the MAT or individual schools. |  |  |
| Provide updates to the board on progress against allocated budgets. |  |  |
| Drive and review [efficiencies](https://my.optimus-education.com/how-efficient-your-school-10-essential-questions) across the trust. |  |  |
| Manage a [procurement strategy](https://my.optimus-education.com/getting-procurement-right-10-point-plan) to ensure individual schools have access to services and achieve value for money. |  |  |
| Develop strategies for the [generation of additional revenue](https://my.optimus-education.com/topic/income-generation) and resources for the trust. |  |  |
| **Ensuring appropriate governance and decision-making** | Provide support and training to governors to ensure they are [properly equipped to be critical friends](https://my.optimus-education.com/multi-academy-trusts-getting-governance-right). |  |  |
| Support the trust and school leaders in the [recruitment](https://my.optimus-education.com/recruiting-governors-and-trustees) and [induction](https://my.optimus-education.com/governor-induction-checklist) of local chairs and governors. |  |  |
| Agree schemes of delegation with the board for day-to-day operations of local governor bodies. |  |  |
| Apply and communicate the strategy at a local governance level. |  |  |
| Provide accurate, succinct and timely performance reports to the boards. |  |  |
| Ensure current educational policies are communicated to the board. |  |  |