Being a trustee in an age of permacrisis

A guide for charity trustees on how to govern in a crisis

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Introduction

Brexit, Covid, the cost-of living, climate change; for anyone tasked with managing risk and making decisions, the past few years have felt like one crisis after another. So much so that the Collins Dictionary chose 'permacrisis' as their word of the year for 2022. And yet we see charities adapting, reprioritising, and finding ways to navigate the ever-changing context for their work, while keeping their mission and the communities they serve to the fore.

Our trusteeship seminars, funded by The Clothworkers' Company, have been running throughout this period. In the seminar series, we have heard from many organisations about how they have been navigating these crises and from many trustees on what has been an important part of their role during this time. This guide brings together these learnings, collating key ideas and information for trustees to use.

In a crisis—or whenever there is a change in the external environment—people need change. If charities continue to deliver what they have always delivered, or trustees continue to make decisions in the way they have in the past, there is a risk that the charity will become less relevant, and less impactful. And trustees might not even know this is happening. Many of the themes addressed by trustees in our trusteeship seminar series are ways to guard against this risk.

In this guide we cover the following topics:

- How to keep focused on your mission

- How to adapt in fast moving situations

- How to draw on the right information to make decisions—including combining lived experience with learnt expertise and data

- How to think about your mission in the context of the wider system

We have written this guide primarily for trustees of small and medium sized charities, but we believe that these lessons are still valuable for trustees of foundations and larger charities too.

Many of us at NPC are trustees ourselves, so we have been grappling with the same issues on the boards that we serve on. Some of these approaches can be challenging, but we have found there is great enthusiasm for applying the lessons of the past few years to future crises.

For more on impactful trusteeship, join us at one of our many events, training sessions and seminars, or get in touch for bespoke support from our team of experts.

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We are grateful to The Clothworkers' Company for funding our work to support trustees.

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Part 1: Adopt a 'mission' mindset rather than a 'preservation' mindset

The top priority for any trustee is to keep your charity focused on its core purpose – achieving impact. It is tempting in a crisis to look inwards, but the Governance Code is clear, charities exist for the beneficiaries, not for the staff. This is true no matter what environment you are operating in – NPC's 2016 paper Above and beyond in trusteeship, described trustees as 'guardians of purpose' who must lead on mission, strategy and impact. And in a crisis, this is never more important. Recent crises have exposed inequalities across the country and the power dynamics within our sector—and it is often our beneficiaries for whom the scales tip even further.

In a crisis, it can be tempting to enter survival mode—preserving the organisation or specific programmes above all else. But you don't have a responsibility to preserve programmes or ways of working—even those which have been effective and valued to date. As mission-driven organisations, it is essential to think of this as primarily a crisis for your beneficiaries, rather than a crisis for your organisation, and it is their needs that should be prioritised and be driving your decisions. In a crisis, it is important to consider what might previously have been unthinkable.

That said, you cannot help anyone without your staff. Your beneficiaries will suffer if your staff cannot perform at their best. If an organisation works in 'crisis response mode' for too long, staff are likely to get burned out and leave. If the organisation neglects staff welfare and is unable to build an inclusive working culture, it risks losing talented, committed colleagues.

This is all easier said than done. For a trustee, there are some key things that you need to do to make sure you can strike this balance:

- Be prepared to take risks.

- Balance focus on immediate challenges and achieving your long-term goals.

- Be prepared to adapt your role as a trustee to attend to the mission.

Be prepared to take risks

The role of a trustee is to manage risks, not to eliminate them. Taking a risk-averse approach rather than a risk management approach can lead to missed opportunities. Decisions deemed risky might have enormous potential benefits for beneficiaries, with manageable 'downside' risk for the organisation. Maintaining the status quo might seem like the lower risk path, but in a crisis, trustees need to weigh the risk of inaction—failing to respond to new needs or changing circumstances—as seriously as the risk of action.

In interviews with Chairs and Chief Executives during the pandemic, we found differing appetites for risk made it difficult to agree a decisive course of action. Many trustees reflected that executive teams were relatively open to risk-taking and eager to try out new approaches, but boards were more risk averse.

When crises hit, the outlook can feel overwhelmingly negative. But the pandemic showed us how charities can rapidly learn new things each day to inform what they do in the medium-term. Taking appropriate risks opens up new routes to social change.

Case study: Quo Vadis Trust (QVT)

QVT, a social housing charity, is a good example of trustees acting quickly, bravely and putting beneficiaries first in a time of crisis. QVT provide social housing, care and support for people living with mental health needs in South-East London. The charity recognised that they needed to act quickly when Covid-19 forced the country into lockdown, by developing a service aimed at getting rough sleepers off the streets when night shelters were closed.

The board of trustees were agile in their response and carefully conducted due diligence on the risk this new service could pose. The new service was a success, and 130 rough sleepers were supported throughout the pandemic, helping to minimise Covid-19 infection rates and save lives. Taking this risk also paid off as QVT secured a 5-year contract to continue this service beyond the pandemic, diversifying their income stream and opening new opportunities for long-term partnerships.

Balance focus on immediate challenges with achieving your long-term goals

One of the biggest challenges for trustees when governing in a crisis is keeping an eye on the long-term needs of beneficiaries when their immediate needs feel so overwhelming. It may be the right decision to devote more resources to service delivery – this was a common feature of charities across the sector adapting to the pandemic. However, as we are faced with repeated crises, trustees may be unsure how to balance needs in the short and long-term. There is no right answer; what is key is having the right discussions.

We can think of short and long-term time horizons in terms of financial and budget decisions. This might include spending reserves in response to an urgent emerging need in the communities that you serve. Trustee boards are generally cautious about this, with an eye to the long-term sustainability of the organisation and the future needs of its communities. Some have taken the view of 'our reserves are for emergencies: this is an emergency'. And a few have gone on to find a sustainable income stream for an intervention that is so clearly needed. The right decision for your organisation will depend on your current financial position and the needs you are seeing.

Another way to think about balancing short and long-term time horizons is in terms of intervention type; for example, the balance between addressing the current impact of crises and forward-facing work to change the systems in which those crises play out. Examples might be investment in advocacy and campaigning. Here the decisions for trustees relate to your capabilities and expertise—do you have evidence, a voice and authority to speak on a subject and effect change? Can you elevate the voice of the communities you serve, and can you help them reach the ears of decision-makers and other actors in the system?

Flex your trustee role depending on the decisions required

Trustees play an invaluable role, asking tough questions when embracing change to avoid costly mistakes—especially since financial risk is higher during times of crisis. It can be challenging for trustees, who are more distant from day-to-day operations, to feel confident taking those riskier decisions.

In times of crisis, you may need to look at your structures and protocols for trustee involvement, adopting a more flexible or iterative approach which helps trustees make timely and informed decisions. For example, making decisions that would normally be seen as more 'day-to-day'

decisions taken by the staff leadership team, might feel more appropriate in times of crisis where time is of the essence. What is key, is knowing which role to assume and when as a trustee.

Leapwise and NPC's paper Charity boards in recovery explored how Covid has changed leadership and decision-making infrastructure in charities, suggesting useful tips for improving decision-making in a crisis.

A thriving organisation to achieve your mission

Whilst mission should be prioritised over organisation preservation, your charity must be sustainable if you are to continue helping people. Finances, operations as well as staff well-being and retention are important issues for trustees to focus on – and never more so than in a crisis.

Your staff may also be facing their own challenges brought about by various crises. An inclusive workplace will recognise the individual needs of its staff, offering flexible and appropriate support. This could involve refunding expenses quicker, training staff with line management responsibilities to recognise and respond to staff needs, and signposting employees to external support services and resources. Staff are not immune to these crises and charities should adapt to the needs of their staff where appropriate.

In summary

- Be brave. Your job is to keep your charity on track to achieve its mission. Sometimes that means taking risks and seizing opportunities.

- Consider immediate needs, but do not forget about meeting your long-term mission.

- Be prepared to take on different kinds of decisions in a crisis – flexing what the organisation needs.

- Look out for your staff's wellbeing – a crisis can affect them too.

Part 2: Be open to change

Gone are the days of the five-year plan. Today's world is changing too quickly. It is still important to have overall goals to aim for and to align your thinking, but you need to be flexible about how you meet those goals. The most effective way of meeting them will change as time goes by, and never faster than in a crisis.

It can be helpful to adopt a change mindset—recognising that change is constant, and that your response will need to keep evolving. In a permacrisis, there is no point holding out for a return to 'business as usual'.

For a trustee, there are some key tools that you can use to help your organisation respond to change in an impactful way:

- Plan differently.

- Consider endings an important part of change and manage them well.

- Use measurement, evaluation and learning to help you adapt.

"Change is constant and more challenging in times of crisis. Trustees must embrace change and respond to change."

Adebayo Oyeniyi, Chair of Quo Vadis Trust

Plan differently: create an adaptive strategy

Traditional strategy approaches have seen charities set detailed objectives, make extensive plans, and even restructure their entire organisation based on fixed-term strategies. But good strategy should not just set the direction of travel, it should be regularly reviewed based on what you're learning.

In a crisis – and our 'new normal' of persistent change - strategy development and implementation must be woven into our day-to-day work and decisions made more often. In doing so, our strategies become more adaptive, relevant, and impactful.

What trustees can aim for is a 'minimum viable strategy', which clearly articulates a deeply understood vision, mission and set of values and priorities. Everything else is flexible and adaptable.

Making this shift means that in strategic conversations, tracking progress on programmes is de-emphasised. Instead, trustee and executive conversations focus on the clear, shared, long-term impacts and values which will guide their decision-making. Decisions about what to do in activity and programme terms (stop, start, dial up, dial down) can then be made on a tactical basis, providing they drive towards that long-term goal.

This allows staff delivering services or support more freedom to make decisions about how to deliver the organisation's strategy – depending on what is most suitable at that time – therefore making the organisation more agile.

Case study: Mencap

Mencap is a charity offering a range of services which focus on valuing and supporting people with a learning disability, their families and carers. In 2021, it developed its new strategy called Our Big Plan which laid out how it was going to achieve its vision of the UK being the best place in the world for people with a learning disability to live happy and healthy lives.

To achieve this, not only did it consider what the content of its strategy should be, it focused on how the charity was going to make decisions. This included new ways to listen and co-produce with people with a learning disability and their families and carers and being community-led, especially where decision-making is done 'with and by' rather than 'to and for'; and creating a flexible culture of test and learn approaches where colleagues respond to new evidence and promote experimenting with new ideas.

See endings as an important part of change

Sometimes, the right decision is to scale down or end some activities all together. This can be tough to do. The emotional investment in particular projects can make it hard to make tough choices, and there are ethical dilemmas around pulling support when people need it most.

Nonetheless, where the pace of change is rapidly accelerating, it is likely that any programme or service will need to be adapted or replaced as needs evolve. Expectations around endings should be built into planning and decision-making, so that this is not seen as a sign of failure.

If you do decide to scale down or end a service, there are some important principles to follow:

- Establish your key principles and rationale with your board and other stakeholders—including those who use the service—as early as possible and develop a clear strategic plan.

- Maintain good communication with staff and beneficiaries. This should include sharing details of your principles, rationale, and plan.

- Do not be afraid to ask difficult questions. You should frequently review your plan and re-evaluate your course of action accordingly.

- Review, consolidate and manage outcomes from closure.

Ending a service can be a new beginning for a charity as you invest time in strengthening and building relationships to prioritise better ways of achieving impact. One of Stewarding Loss's [7 principles for better endings](#) is to 'acknowledge that endings, as with beginnings, are an inevitable cycle of renewal for people and organisations engaged in change work'. These principles can be helpful for shifting the organisation's mindset and framing conversations about endings.

Case study: SignHealth

[SignHealth](#) is a great example of a charity that used its reserves to respond to the pandemic by opening a new service, and then responsibly closing it down once immediate need has passed. SignHealth seeks to improve the health and well-being of deaf people. In March 2020, it launched a free 24/7 remote British Sign Language (BSL) interpreting service to ensure that deaf people could access medical services during the pandemic. The board responsibly invested £800k of its reserves to fund the service, and they soon received a four-month grant from NHS England to cover the cost of the service.

However, without further funding from NHS England the board had to carefully considered its options before taking the decision to close the service, one year since it became operational. This was a very challenging decision for the board following detailed consultation with the leadership team. The closure of this service led NHS England to commission a rapid review of BSL interpreting services. This put SignHealth in a strong position to build its relationship with NHS England and lobby key decision-makers on wide-ranging issues affecting deaf people.

Use measurement, evaluation and learning to help you adapt

Adaptive strategies are iterative, based on continuously learning from what is working and what is not. Trustees have a responsibility to ensure that the organisation has the right impact management approach – so that staff can know what is and is not working. They then need to make the right decisions; and ensure that the board uses these insights when making strategic or governance decisions.

If we see 'permacrisis' as continual change, rather than a brief pause in business as usual, it is clear that we need to use the tools at our disposal to understand and reflect on what is needed, what is working, and when to pivot.

In a rapidly changing (or crisis) situation, it may be tempting to de-prioritise any 'non-delivery' activity, and lessen focus on measurement, evaluation and learning. Good measurement, evaluation and learning is about trying to answer some basic questions with the best information you have: What did we do? How well did we deliver it? Is anyone better off?

More specifically, measurement, evaluation and learning should help:

- Manage and steer work over the course of a year, by ensuring a regular review of work to see if things are working as they should and inform changes along the way. We call this 'impact management'.

- Take a longer-term view of questions regarding achievement against strategy, and whether resource is focused on the right things.

- Impact-focused planning: Giving you the right information about what is working well or less well, and what is needed going forward. This will help you make decisions about budgets, planning, and channel resources where they are most useful.

At NPC we have published advice on our website for how you can get started with measuring your impact. We also run regular training and provide bespoke support for clients.

In summary

- Have a clear goal but be flexible in how you meet it.

- Continually review your strategy based on what you are learning.

- Have a clear set of values to guide your decision-making.

- Expect that services will need to continually change in response to a changing world—closing services can be a positive move forwards, not a failure.

- Shift focus from tracking KPIs to learning from insight—aim for continuous improvement.

Part 3: Draw on the right input to make your decision making relevant

Board decision making can only be effective with the right data, expertise and insight. But things change quickly, and you will need to be making sure that your decisions are up to date, credible, and relevant—and even more so when the stakes are high in a crisis.

Who interprets this data will also influence *how* and *what* decisions are made. Ensuring the board has a diverse range of trustees with different perspectives and experiences is crucial. Diversity of thought can help tackle entrenched attitudes about what is right for beneficiaries.

Trustees should:

- Understand who needs your organisation's help the most, so that you can prioritise them.

- Gather and use data on need, but also feedback data and outcomes data.

- Make sure lived experience is influencing decision making at board level.

Understand who needs your help the most

Existing structural inequalities in our society mean that crises hit some harder than others. Within the group of people that you are aiming to support, you have to know who needs your help the most. Needs can change rapidly, and your assumptions about the level and location of need, or where you can practically make a difference, can quickly become dated. In a permacrisis, you are likely to see changes in both the level of need and demand for your support, as well as changes in who is in need of it. Trustees tend to look at dashboards or KPIs, often on a quarterly basis. In a crisis this is likely to be insufficient and trustees will need to see more in-depth information, more regularly.

Triangulation is looking at different sources of information to see if they are telling you a consistent story about evolving needs. Where you start to see differences in what information sources tell you, it is an indication to look deeper. For example, you might draw on your own data collection

(customer surveys, programme evaluations); professional expertise of frontline staff; the experiences of your beneficiaries; and published data sources.

You do not need to collect all of this data yourself. You can find lots of useful data already in our [Local Needs Databank](#), which we regularly update to help charities and funders better understand the needs of communities around the UK. We created this resource because there are large amounts of readily available data which can tell us a lot about places across the UK. However, this data is spread across numerous sources and can be difficult to compare. You can use it to create your own tailored, interactive data reports on the places and needs that matter most for your work. This will allow you to learn more about the places where you work and compare them to areas facing similar levels of need. Data like this can help you to better understand what you need to do, for who, where, and how.

Understand user, feedback and outcomes data

As well as understanding need, you will need to gather and use data on who your services are reaching and the difference that they are making. It is, therefore, more important than ever to monitor and review who you are reaching (and who you are not reaching). This helps target support to particular groups and pay more attention to those you know need your service but might not be accessing it. It will also help you to monitor demand and make decisions about how to manage it.

You will also need to monitor feedback data: whether what you are providing is still what people need. This can include partners and other stakeholders that your organisation is working with. Along with other quality markers, feedback data allows you to check how well people feel you are doing things and whether it is what is needed.

Trustees will want to monitor outcomes data: organisations need to know that their work is achieving positive results, particularly where contexts are changing. This will help you to make decisions about whether the approach you are taking is still the right one. But remember to be proportionate, you only want to collect as much of this data that is useful and supports your decision making.

A crisis, and the need for quick decision-making, makes it even more important to have systems and a clear responsibility for reviewing and updating your analysis, as new data and insights become available. We have seen organisations convening regular 'insight boards' where key staff discuss what they are learning from the data.

Make sure lived experience is influencing decision-making

Lived Experience refers to '*The experience(s) of people on whom a social issue, or combination of issues, has had a direct impact*'[1].

Lived experience is an important data source because it is real-time: there is no lag between the impact of a crisis being felt and the information reaching you. Lived experience can help you to better interpret data, allowing you to respond to need and pivot your strategy when required. Other sources of data can help you to understand and contextualise what people with lived experience are telling you.

Decisions made with people who are closer to the challenges have a better chance at being proportionate, agile, and ultimately impactful. Combining this with learnt expertise and measurable data will support your organisation in being relevant and credible – this is never more important than during a crisis, when boards are faced with making tough decisions.

Meaningfully involving lived experience is not easy. By ensuring it truly shapes *what* and *how* decisions are made, it can lead to more inclusive and transparent ways of working. Including people with lived experience at board level, is an important way of making sure that lived experience is really shaping the strategic direction of the organisation and having an impact at all levels.

But this is not simply a matter of recruitment. Adding a single person with lived experience creates an unreasonable expectation that one person can 'speak for' a much wider community. It is not reasonable to expect a single person to take on the role of speaking up and changing the nature of a board's conversations.

Incorporating lived experience without being tokenistic requires sharing power differently—this is a cultural shift which needs to be underpinned by practical changes. It takes time to embed, and you may need to try different approaches before you find the right one for your organisation.

A good board will be self-reflective, empowering trustees to develop and grow their role, such as by listening to one another about their experiences. It will create space for people with lived experience to support the charity in multiple ways, rather than being pigeonholed by a predetermined notion of *how* and *where* they can be involved. Acknowledging the breadth of skills and experience an individual can bring is one way to avoid tokenistic approaches.

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[1] Report – Launch of the forthcoming report (thelivedexperience.org)

Case study: Young Manchester

Young Manchester has successfully blended lived experience across its governance structures with a co-Chair model and a minimum of three young trustees on its board.

As a young people's foundation and membership organisation, Young Manchester always knew they needed young people at the heart of governance. However, blending lived and professional experience was certainly iterative, building from intention to delivery, with impacts not yet fully understood.

Initially, the only interaction the board had with young people was through those engaged in its local projects and a single young person as a board member. This was limiting and they knew that there was much more scope for disrupting power. The board then tested a new approach to power sharing by trying multiple tactics, including employing young staff to make recommendations on governance and with a small grant programme led by its young people.

These steps enabled the board to welcome young people into decision making spaces as they challenged mindsets about power sharing and actively created a more accessible environment.

Approaching this journey with humility, and a recognition that there is no one size fits all approach, is a good first step to combining lived and professional experience.

In summary

- Make sure you know who needs your help the most and prioritise them.

- Utilise data on who you are reaching, the feedback they are giving you, and the outcomes data you have, to make decisions about what to do next.

- Blend lived experience with professional expertise and data, so that your decisions reflect the needs and priorities of the people you work with.

- Avoid tokenism by ensuring that people with lived experience are genuinely influencing your decisions, rather than merely giving feedback on your choices.

Part 4: Look beyond your immediate focus

As the pandemic and the cost-of-living crisis have shown, trustees cannot afford to think about their missions in silo anymore. You do not have to be focused on health to see the impact of the pandemic. You do not need to be tackling poverty to see the repercussions of the cost of living crisis. You do not have to be an environmental charity to worry about the impact of the climate and nature crisis.

These are all prime examples of why trustees need to think beyond their immediate focus and instead consider how the whole system impacts upon beneficiaries. A broader understanding of what else is affecting the people you are seeking to help, and which other charities you should be working alongside, will lead to wiser decisions that better support those you are seeking to help.

It can feel overwhelming to know where to start, but trustees can prioritise doing the following:

- Understanding your organisation as part of a wider ecosystem.

- Working with others.

Understanding your organisation as part of a wider ecosystem

In times of rapid change, it is important to review and regularly reassess how your organisation fits into the wider ecosystem: previous assumptions may quickly become inaccurate. To respond effectively as circumstances change, you need to see your organisation as one of many moving parts.

As a sector and a society, we are increasingly aware of the intractability, interdependence, and complexity of our problems. Systems tools, concepts and frameworks can help us understand how to approach these problems. Many organisations are now incorporating some systems analysis into their planning—thinking in terms of leverage points for change.

One way to incorporate systems analysis into your planning is by using the Three Horizons Model. This can help look at change as a moment of opportunity as well as challenge:

- **What is new and how can we do it well?** What new activities or ways of working do your beneficiaries need?

- **What is ending and how can we help it to leave well?** What activities are no longer appropriate or viable and how can we phase them out with minimum negative impact?

- **What is being disruptive and how can we harness its potential?** Are emergency adaptations to a crisis actually a better way of working?

By considering these questions as a crisis hits, it is more likely that your response will be successful. We will be publishing more tools and approaches in our forthcoming systems change toolkit.

Work with others as part of a systems strategy

No single organisation alone can achieve its mission. Crises like the pandemic, the cost-of-living, and the climate and nature crises, reveal how we can only address our systemic challenges by working together. Many organisations, therefore, are moving beyond simply understanding themselves within an ecosystem, towards opening up their strategy setting to work collaboratively with partners. This can help build shared voice, effective pathways through the system, and reduce duplication.

As trustees, it is vital to approach strategy with greater humility and honesty about your charity's role, limitations, and interdependence with others in the system. Instead of setting a strategy for your charity, why not work with others to set a strategy for the issue as a whole and identify your own place within that wider systems strategy?

Collaborating at the strategic level, rather than through limited individual projects, achieves greater impact. You can share out responsibility by signposting beneficiaries to the best services, thereby reducing unhealthy competition and boosting your resilience to shocks. Sharing expertise improves efficiency and avoids duplication, as well as creating new funding and publicity opportunities through growing your networks. Feedback from others in the sector can also help you to learn and improve your services.

When choosing who to work with, seek unlikely partnerships, you will be surprised how much you benefit from them. If your partners are smaller than you, be sure to collaborate equitably, such as by:

- Paying partners fairly for their contribution.

- Allocating resources based on a needs analysis that recognises 'multiple disadvantage'.

- Sharing power between partners and addressing hidden hierarchies.

- Using a facilitator to create a level playing field for different voices to co-produce solutions where needed.

Case study: WILD Young Parents Project

WILD Young Parents Project responded to the cost-of-living crisis by focussing on cross-sector collaboration. WILD is based in Cornwall and provides support to the whole family through a range of services for mums, dads, and their children.

As the impact of the cost-of-living crisis started to show, WILD created a cost-of-living working group, bringing together key team members and external organisations from across Cornwall. It focussed on strengthening voluntary sector alliances, formed during the pandemic, to plan collectively and share out responsibilities across food, housing, advice and more.

WILD recognised that working collaboratively across systems helps it to achieve the greatest impact for its beneficiaries, especially for those with multiple and complex needs. For example, the group shared information about which grants were available and how to access them, as well as local campaigns to support. The group also strengthened relationships between organisations, benefitting beneficiaries as they could be signposted for additional support from another service. This was also useful for staff in need of support.

Collaborating at a strategic level has a range of benefits, especially during a crisis. For WILD, it increased its impact on those who use its services and boosted WILD's resilience during a very challenging period.

In summary

- Instead of putting yourself at the centre of your strategy, work with others to create a systems strategy for the entire issue and identify your place within it.

- Seek unlikely partners and ensure your collaboration is equitable.

More resources

Guides

[Theory of change in ten steps](#)

[Starting to measure your impact](#)

[Systems change: A guide to what it is and how to do it](#)

[Implementing and evaluation co-design](#)

[Charity boards in recovery](#)

Coming soon

Look out for our guide to creating a culture of lived experience in your charity, coming soon.

For a summary on how charities can centre lived experience in a meaningful and impactful way, read the following [blog](#) to learn more.