

The skills matrix *for charity teams*

Charities run on a blend of paid staff and volunteers, often stretched thin and mission-led rather than process-led. That makes them quietly vulnerable: a critical skill may rest entirely on one volunteer, and nobody notices until they leave. A skills matrix maps capability across staff and volunteers alike, so a charity can see where it is genuinely covered, where it depends on goodwill, and where one departure would hurt.



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Reading time 12 min · **Method** Upleashed 0 to 5 capability framework · **Updated** May 2026

THE SHORT ANSWER

A charity skills matrix maps the skills the organisation depends on against everyone who delivers them, paid staff and volunteers alike, scored on a clear scale. Read it to see who can actually cover each critical skill, where you rely on a single volunteer, and where a skills audit should drive training or recruitment. In short: **it shows, across staff and volunteers, who can cover what, so a charity can spot the skills resting on one pair of hands and the over-reliance on goodwill before it becomes a crisis.**

KEY TAKEAWAYS

- **Map staff and volunteers together.** Charities deliver through both, so the matrix must cover paid and unpaid people alike.
- **Spot the single-cover skills.** A critical skill resting on one volunteer is a real risk that builds slowly and unnoticed.
- **See reliance on goodwill.** The matrix shows where delivery depends on volunteers who can step back at any time.
- **A skills audit drives action.** Done regularly, it prioritises training and targets recruitment, including of trustees.
- **Do more with stretched resources.** With tight budgets, knowing exactly where capability sits is how charities deploy it well.

— START HERE

Delivered by staff *and* volunteers

What makes a charity distinctive is who does the work. Delivery rests on a blend of paid staff and volunteers, and often on trustees, with tight budgets and a mission-led culture that rarely leaves time for formal workforce planning. A skills matrix is unusually valuable here precisely because that blend hides risk: it maps capability across everyone who delivers, paid or not, so a charity can see what it can actually do, and where it is exposed.

Map everyone who delivers

A charity matrix must include **volunteers alongside staff**, because both deliver the mission and a skill is no less critical for being held by an unpaid person. Many charities run almost entirely on volunteers and trustees, so a matrix that maps only paid staff sees a fraction of the picture. Mapping the whole delivery base, staff, volunteers, and where relevant the trustee board, is what turns the matrix into an honest view of the charity's real capability.

Find the single points of failure

The risk a charity matrix most needs to surface is the **skill resting on one person**, very often a single volunteer. These gaps build slowly and unnoticed, an over-reliance on certain people that does not announce itself until that person steps back, and then a critical capability, fundraising, finance, a key service, suddenly has no cover. By showing who can cover each skill, the

matrix makes these fragile single-cover points visible while there is still time to build backup.

Audit to prioritise scarce resource

Charities operate with stretched budgets and stretched people, so a regular **skills audit** earns its place by directing scarce resource well. It shows where a particular weakness is hampering the mission, so training goes where it matters most, and it informs recruitment, of staff, volunteers, or trustees, by pinpointing the skills the organisation is missing. Done at least annually, the audit lets a charity respond quickly when someone leaves and plan ahead rather than always reacting.

— WHY IT MATTERS NOW

Reliance on goodwill is *fragile*

A charity that depends on a few key volunteers for critical skills is one resignation away from a gap it cannot quickly fill, on a budget that leaves little slack. Mapping capability across staff and volunteers is how a charity sees that fragility and acts before it bites.

~48%

TPP SURVEY, 2024

of charities have no formal workforce planning strategy, despite nearly 80% saying it is important.

8%

GARTNER, 2024

of organisations have reliable workforce skills data, so most charities cannot see their real capability and gaps.

63%

WEF, 2025

of employers call skills gaps the biggest barrier to change, a pressure charities feel acutely with limited resource.

The danger for a charity is that its biggest risks are invisible until they crystallise. Reactive, always-hiring-for-now resourcing lets long-term issues, overlapping roles, missing skills, excessive reliance on certain people, build slowly and unnoticed until they hit delivery, retention or morale. A skills matrix counters this by making the **capability across staff and volunteers visible**: where cover is genuinely solid, where a critical skill rests on one volunteer's goodwill, where a weakness is holding the mission back. Seeing this lets a charity build backup behind its single-cover skills, target its limited training budget, and recruit, paid or voluntary, for the gaps that genuinely

matter, turning a fragile, person-dependent operation into a more resilient one without needing a bigger budget.

— WHAT IT PROTECTS

Four things a charity matrix safeguards

In a charity, a skills matrix protects four things that bear directly on the mission and the people it serves. Each is a strong return on a low-cost exercise.

PROTECTS 01

Continuity of the mission

By surfacing skills that rest on one person, the matrix lets you build backup before a departure leaves a critical service or function with no cover.

PROTECTS 02

Against over-reliance

It shows where delivery depends on a few key volunteers' goodwill, so you can spread capability rather than carry hidden, slow-building risk.

PROTECTS 03

Scarce training budget

It directs limited resource to the weaknesses actually hampering the mission, rather than spreading thin training across everything.

PROTECTS 04

Targeted recruitment

It pinpoints the skills you lack, so you recruit staff, volunteers or trustees for genuine gaps rather than reactively or by guesswork.

The common thread is **resilience on a tight budget**. A charity cannot buy its way out of a capability gap the way a well-funded company might; its strength is the people, paid and unpaid, who give their skills to the cause, and its vulnerability is depending too heavily on too few of them. The matrix is the low-cost instrument that makes that dependence visible, so a charity can deploy its scarce capability deliberately, build cover where it is thin, and keep the mission running even when a key person moves on.

— THE SCALE BEHIND THE SCORES

The 0 to 5 capability framework

A charity matrix needs a scale that works the same for a paid specialist and a skilled volunteer. This framework, developed by Dr Alex J. Martin-

Smith, judges capability, not employment status, with Level 3, can do it unsupervised, the bar for genuine cover whether the person is staff or volunteer.

-
- 0** **No skill required or desired** **EXCLUDED**
- The skill is not part of a given person's role. In a charity, it keeps the matrix focused on the capabilities the mission actually depends on.
-
- 1** **In training / New** **WEIGHTING 25%**
- Learning the skill, works with support. Up to 75% of the way there. A willing volunteer or new staff member building towards being able to cover it alone.
-
- 2** **Developing** **WEIGHTING 50%**
- More than 75% trained; can do routine work alone, but not yet relied on for the harder cases. Useful developing cover, not yet full backup.
-
- 3** **Capable** **WEIGHTING 75% · GENUINE COVER**
- Can perform the skill unsupervised to standard, staff or volunteer alike. The level that counts as real cover, two people here means the skill is not single-covered.
-
- 4** **Expert / Mentor** **WEIGHTING 100%**
- Deep capability; handles the hardest work and can train others. Often a long-serving volunteer or specialist staff member, and exactly the person to build backup behind.
-
- 5** **Strategic ownership / Leadership** **WEIGHTING 100%**
- Sets direction and standards, often a senior staff member or trustee. The purple flag marks leadership the charity most needs to keep and to plan succession for.

Count the capable, whoever they are

For each critical skill, count how many people, staff and volunteers together, are at Level 3 or above; that is your real cover. A skill with only one capable person is a **single point of failure**, and one covered only by volunteers carries the extra risk that volunteers can step back at any time. Reading cover this way, by capability not status, is what shows a charity where it is genuinely resilient and where it is quietly exposed.

A worked example. Why who covers a skill matters as much as how many:

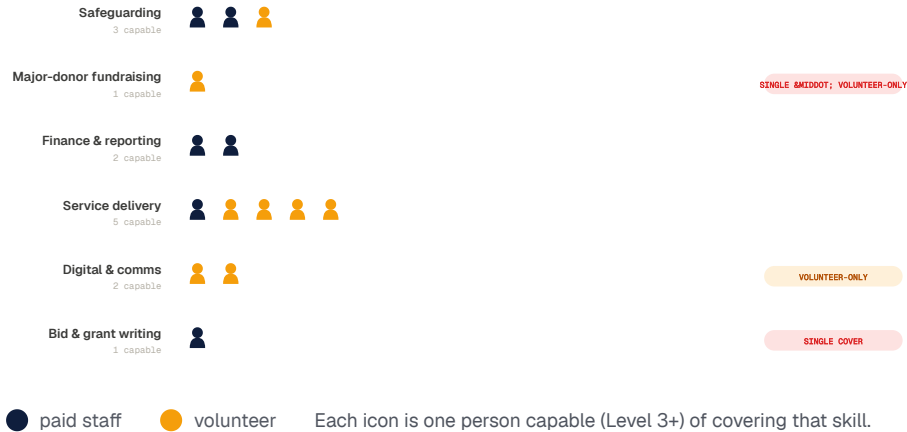
Service delivery 5 capable (mostly volunteers) → well covered, watch volunteer turnover
Major-donor fundraising 1 capable, a volunteer → **single point of failure**
same charity, very different risk – build backup behind the fundraiser first.

— [SEE THE COVER](#)

Who can cover each *critical skill*

Here is a charity's cover set out person by person: for each critical skill, an icon for everyone capable of covering it, dark for paid staff, amber for volunteers. A long row is well covered; a single icon is a risk; an all-amber row depends entirely on goodwill. The picture shows, at a glance, where the charity is resilient and where it is one departure from a gap.

WHO CAN COVER EACH SKILL · STAFF vs VOLUNTEERS



3

skills at risk: major-donor fundraising (one volunteer), bid writing (single cover) and digital (volunteer-only)

Illustrative charity on the Upleashed 0 to 5 framework. Each icon is a person capable of covering the skill; colour shows staff or volunteer.

WHAT THE CHARITY MANAGER READS HERE

- **Major-donor fundraising is the priority.** A single amber icon, one volunteer, on a skill the charity's income depends on. If they step back, fundraising has no cover. Building backup here is the most urgent action.
- **Bid writing is single-covered too.** One paid staff member, no backup. Less fragile than a lone volunteer, but still a skill to spread before a departure or absence stalls grant applications.
- **Digital is volunteer-only.** Two volunteers cover it and no staff, so it works, but rests entirely on goodwill. Worth a paid or trustee-level eye on it, and a plan if a volunteer moves on.
- **Service delivery is well covered.** Five capable people, the healthy pattern, though mostly volunteers, so keep an eye on turnover. This is what resilient cover looks like.

— READY-TO-USE EXAMPLES

Example skills to map for a charity

A charity matrix should map the skills the mission depends on, across staff and volunteers. Here are ready-to-adapt categories, a starting point to tailor to your cause and size.

Category	Examples to map (the columns)	Watch out for
Income generation	Major-donor and individual fundraising, bid and grant writing, events	Income-critical skills resting on one volunteer's goodwill
Service delivery	Frontline support, safeguarding, the core skills of your cause	Safeguarding cover that is thinner than it looks
Back office	Finance and reporting, HR, IT and systems, data protection	Underestimating back-office gaps in a delivery-focused culture
Communications	Digital, social media, marketing, communications	Whole functions covered only by volunteers who can step back
Governance	Trustee board skills: finance, legal, strategy, sector expertise	Gaps on the board, found via a regular trustee skills audit

Map the skills your mission genuinely depends on, scored so Level 3 means someone can cover it unsupervised whether they are staff or a volunteer, and count cover across both. Include the trustee board where governance skills matter, since a board skills audit is a well-established charity practice. As always, map what matters most, keep it current as volunteers and staff come and go (which they do often in the sector), and run the audit at least annually so you can act before a gap becomes a crisis.

— AVOID THESE

Six mistakes on a charity matrix

MISTAKE 01

Mapping staff only

Volunteers deliver much of the mission. Map them alongside staff, or the matrix sees only part of the picture.

MISTAKE 02

Missing single cover

A critical skill on one person is the core charity risk. Count capable cover and flag anything resting on one.

MISTAKE 03

Ignoring goodwill risk

Volunteer-only cover can vanish overnight. Note where delivery depends entirely on people who can step back.

MISTAKE 04

Spreading training thin

Tight budgets punish scattergun training. Target the weaknesses actually hampering the mission.

MISTAKE 05

Forgetting the board

Governance gaps are real risks. Run a trustee skills audit and recruit trustees for what the board lacks.

MISTAKE 06

Auditing once

Volunteers and staff turn over often. Refresh the audit at least annually so you can act before gaps bite.

The method is free. A ready-made matrix just makes the single-cover skills *impossible to miss*.

Everything here works in a blank spreadsheet, and for a charity that is often exactly the right place to start. A purpose-built template just makes the picture clearer: list staff and volunteers, score them on the 0 to 5 scale, and the cover count per skill is calculated for you, so the skills resting on one person, the volunteer-only functions and the board gaps stand out, letting you act before a key departure turns into a crisis, all on a free or low-cost tool.



The Advanced Excel Skills Matrix counts cover per skill across everyone who delivers, the basis for spotting single-cover risks and reliance on volunteers, all on the same 0 to 5 framework used throughout this guide.

TRY IT FREE

£0

The online 5x5 builder maps a small team in your browser, with no sign-up. Ideal for a small charity.

MOST POPULAR

£199

The full Excel template: heat map, cover counts, required levels and analytics, up to 30 people and 30 skills. One-off, yours forever.

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£1

Upgrade to PulseAI in your first year for a living, web and mobile version with AI skill suggestions and reminders.

— COMMON QUESTIONS

Quick *answers*

Q What is a skills matrix for a charity?

It is a grid mapping the skills the mission depends on against everyone who delivers them, paid staff and volunteers alike, with a level in each cell. It shows who can cover each critical skill, where capability rests on a single person, and where a charity is over-reliant on volunteers, all on a clear, low-cost basis.

Q Why map volunteers as well as staff?

Because charities deliver through both, and a skill is no less critical for being held by an unpaid person. Many charities run largely on volunteers and trustees, so a matrix that maps only staff sees a fraction of the picture. Including volunteers gives an honest view of real capability, and of where reliance on goodwill creates risk.

Q How does it reveal single points of failure?

By counting how many capable people cover each skill. A skill with only one person at the level needed to do it unsupervised is a single point of failure, especially if that person is a volunteer who can step back at any time. The matrix makes these visible so you can build backup before a departure leaves a gap.

Q What is a skills audit and how often should we do one?

A skills audit is the exercise of mapping current capability against what the charity needs, to find the gaps. It is well-established practice, including for trustee boards, and is best done at least annually, since staff and volunteers turn over frequently. Regular audits let you act quickly when someone leaves and plan rather than react.

Q Does it cover the trustee board too?

It can, and often should. A trustee skills audit maps the board's mix of finance, legal, strategic and sector skills against what good governance needs, highlighting gaps to prioritise in trustee recruitment. Many charities run this annually, and the same 0 to 5 approach works for the board as for staff and volunteers.

Q We have almost no budget, is this still worth it?

Especially so. A charity cannot buy its way out of a capability gap, so knowing exactly where its scarce capability sits, and where it is dangerously thin, is precisely how it deploys limited people and training well. A skills matrix is a low or no-cost exercise that protects the mission against the quiet risk of over-reliance on too few people.

— ABOUT THE AUTHOR



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Alex is the creator of the Upleashed capability framework that powers Skills Matrix Template, the award-winning Excel skills matrix. A Chartered Manager with an MBA, an LLM and a doctorate in business administration, he has spent more than two decades helping operations, HR and quality teams turn capability from a gut feel into something they can measure, manage and prove.

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A handwritten signature in black ink that reads "Alex J. Martin-Smith".

Dr Alex J. Martin-Smith

— SOURCES

Gartner. (2024). *Talent management research: Workforce skills data*. Gartner.

Martin-Smith, A. J. (n.d.). *The 0 to 5 capability framework*. Upleashed Limited.
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World Economic Forum. (2025). *The future of jobs report 2025*. World Economic Forum.

Protect the mission from *hidden gaps.*

You now have the charity method. The quickest way to start is to list the skills your mission depends on, mark who can cover each, staff and volunteers, and look for the lone icons. The single-cover skills and the goodwill-dependent functions you find are exactly where to build backup, before a key person moves on.

[Try the free 5x5 builder →](#)

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