involve
MAKING A DIFFERENCE LOCALLY

A guide to setting up and running a "group for good", such as a community group, or a steering group

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We have tried to make our guide as accurate as we can, based on the Charity Commission guidance, which is definitive.
If you find our mistakes here, please let us know as soon as possible.

If you need more information or cannot access the documents linked in this guide, please ask involve Community Services employees

This is a guide to follow step-by-step, to help you start up and run a small community group, or a steering group that may develop into something larger. We've tried to make the steps easy to follow & accurate (October 23), but if you find anything that isn't right, please let us know.

Is a charity the best way for you to achieve what you want for your community, for your 'group for good'? You do NOT have to form your group into a charity - there are other types of 'group for good' including social enterprises and cooperatives. There are some advantages & disadvantages in charitable status *and* in other those other groups. There's no room here to describe those other types of group, so discuss your ideas with **involve** Community Services, who can advise, with you deciding.

Note: if your cause is obviously "political", or primarily about campaigning, you *can* set up as a community or steering group, but you might find some difficulty in further registration as a charity, as the Charity Commission discourages charities from being overtly "political".
Don't let that stop you considering it!

However, if your group is or will be aligned to a particular Political Party, you **cannot** set up as a charity.
Ask **involve** Community Services for a discussion and guidance if your group wants to be a campaigning group.

Why are we doing this?

You are from a community (geographical; community of interest; community of ethnicity/nationality; housing/residents; etc.),
OR

If you want to set up and register a *charity*, **involve** Community Services suggest *first following these steps* to get your group going. We have a separate guide to getting your now-already-set-up community or steering group to then formally register as a charity, and you'll make the charity registration process easier if you're already a formally-organised group.

You have a common cause (e.g. health, environment, young people; older people; animals; etc., etc.) that unites you.

You want to create a 'group for good'

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You don't yet have any formal structure, rules or regulations, and you may not even know if you need those.

You have at least three people over 18 years old, and who can't be related to each other as family members, who may be interested to be 'in-charge' of the group.

Ideally, having more than 3 will help, as that will help you share the workload, skills and abilities, but it may be best to keep that number no more than 7 or 8 at this point, to help get agreement in your discussions.

If your idea is to develop a specific idea or project, and you are effectively a 'steering group' for that, you should involve people and other organisations as members of your group.

SAVE CATS

What are we going to do?

This group of at least of three of you is "**the Committee**" at this point. More people can join or leave the Committee in the future, but you must keep at least three people on the Committee.

The first step is to meet, discuss and agree
some simple aims and objectives:
Write down some short sentences
("We will provide weekly lunch for isolated older people"; "We will rescue and home stray cats"; "We will provide information and assistance to people with specific health problems"; etc.).

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You will probably want to geographically-limit those aims, too ("We will provide this in AnyTown only"), at this point. You can eventually grow your group as large as you want, but starting small is better.

Try to limit the number of these written aims, and don't be too broad (Don't say "we want to help young people *and* older people *and* cats and…").

WE CAN WE WILL WE MUST

Our purpose

These aims and objectives are called your group's **Objects**, or your purposes. More than three Objects will cause confusion for the future, especially if you eventually intend to register as a charity.

Your Objects will probably also define your beneficiaries: the **people** who will benefit from your group's support or services. *(Example: It's worth noting that if you are rescuing stray cats, the benefit is NOT to the cats, but to the* people *or the community from where you have rescued them or to where they're re-homed).*

Benefit must be to a group of people (i.e. more than a few).

If you eventually decide to register as a charity, you will have to clearly describe what is called "Public Benefit" *(much more on that in the separate guide to setting-up a charity).*

Public Benefit test

You must decide who will lead (or "chair") the group. That person will become the **Chair**, but isn't more-important than the other Committee members, just the coordinator and leader of meetings.

You may also want that person to speak to others on behalf of your group, to help recruit new Committee members, to publicise the group, but your Chair doesn't have to take on those *additional roles if they don't want to.*

You should also allocate the tasks of 'looking after the money' and decide on a **Treasurer**. That person isn't the sole person responsible for the money, just the coordinator for your money and accounts; they don't necessarily need financial qualifications, just numeracy.

You should also allocate the tasks of 'taking notes and keeping records' and decide on a **Secretary**. That person is responsible for making sure everyone else sees those notes, and where and how they're stored; they don't need to be able to take dictation, but basic literacy is good.
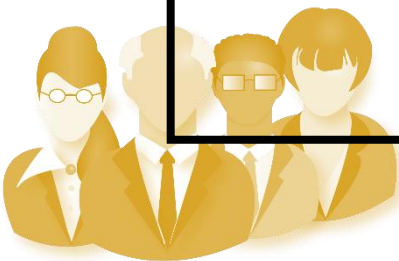
Together, the Chair, Treasurer and Secretary are usually called "**The Committee**." There can be additional people on the Committee, if you want that, which we'd recommend.

You should look for other people to join your Committee, to lead on:
• publicity and recruitment,
• your funding and fundraising,
• marketing and communications,
• digital security and social media,
• or many other areas of your operation.
If you have formed a steering group to guide a future project or organisation, you probably want to involve the other people with interest in that future idea. You don't have to have additional people, but **in**vol**ve** Community Services believes that having more people helps you share the workload.

All your Committee members are **equal**, and collectively share responsibility for your group's actions and operations.
No one is more-important than any other, even if the group's initial idea or cause came from one person.
All your Committee members get one vote each at meetings.

Our Group Name

You should create a name for your group, one that explains in a few words what you'll be doing ("The Easthampstead Young People's Group"; "Barkham Dogs' Shelter"; "Protect Our Trees!", "Steering Group for a future Arts Project"). This is also where any geographical limits you have decided are useful to define.

If you've already thought about your group's future and whether or not you might eventually want to register as a charity, it's still worth searching the Charity Commission register for similar names, as you don't want to be confused with another group. The CC won't allow you to register the same or similar names (Naming a charity). You may also want to search the internet for similar names of groups, organisations or companies, as not every UK charity currently needs to be registered with the Charity Commission. Similarly, you don't want to share your group's name with a commercial or private company or their Trade Mark™.

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Our rules

If your group is going to exist for more than one event, i.e. you want a permanent group, you will need to write or create a **Constitution**, which is the simple set of *rules* and explanation of your group.

Your Constitution is a *Legal Document* that defines your group:
**it is NOT advisable to just copy one you find online**.
Use a Charity Commission model, or similar authorised document, or ask **involve** Community Services to recommend a suitable template.

A Constitution for a community group can be different from a set of rules for a Steering Group, but doesn't have to be.

It may be that you create a simple Constitution for now, and change that document as your group grows. Changing it may take a little effort and thought, but having a too-complex Constitution now at the start is probably worse.

Creating and agreeing a Constitution *doesn't* make your group a charity, but it can be the first step, if that's what you might eventually want, and even if you don't, you need some formality and a few rules for your group.

You will need to meet your fellow Committee members and formally agree the Constitution: you should invite as many people who are interested in your group, your cause, your community, to a meeting, where you read out the Constitution. You may want to get everyone present to vote (put their hands up) to agree the Constitution.

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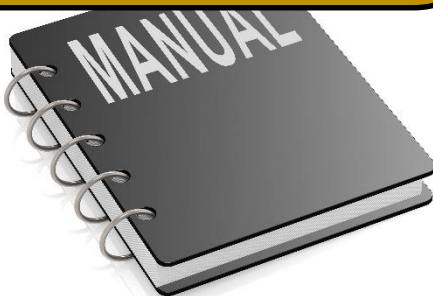
Your Constitution will have your **Objects** at its start ("The purposes of the group are to........").

Although your group can change these purposes, ideally you should try not to, or at least not too much change, once you've decided.

If, in the future, your group becomes a Registered Charity, any change to your charity's Objects is *quite difficult*.

Get your written Objects right, here and now, will help your group as it grows.

Members of the Committee will put their names and signatures on the Constitution and date the document. Keep this safe and make a few copies (you may need to give other organisations a copy later); an electronic or scanned copy is the best option, if you can do that to include those signatures and date.

The Secretary will take notes of the meeting - who is present, what's discussed, what's decided – and simplify these into Minutes *(these aren't verbatim notes, more a summary, clearly showing decisions, reasons for those decisions, numbers voting, etc.).* A simple guide to taking Minutes; a longer guide to taking Minutes.

After the initial meeting that took place on the date now shown on your completed Constitution, the members of your Committee should meet again, to agree ("ratify") the Minutes of that initial ("General") meeting. You will need the subsequent Minutes of *this* Committee meeting when you set up a bank account.

Your group must be 'not-for-personal-profit', meaning no one can personally benefit from its finances. When your group has a surplus of income over spending, you are *required* to spend that surplus on the group's activities for your beneficiaries, or save it for the future to do the same.

NFP

You could, if you wanted and your group felt it was appropriate, charge your beneficiaries for the services you offer, provided that your charges are *less* than commercial alternatives, and that you're not excluding people who could benefit if your services were cheaper or free.

Example: you could charge your beneficiaries for lunches you provide, but if that's no cheaper than a restaurant, you're obviously not not-for-personal-profit. Generally, you will offer your services freely, because you will ask other people for money donations to subsidise those services.

Obviously, any money you *may* decide to charge must go into the finances of your group, for it to grow, offer your services to more people, maybe using the money to provide your services for people who can't otherwise afford them ("cross-subsidising").

If you are, or might start, charging for your services, your Committee should discuss this and write down (in your Minutes) all the reasons why you're charging, why you think your charges are reasonable and less than similar commercial rates, and how people who might be excluded by those charges can access your or similar services.

If you've already had some income or spending and you've had to use Committee members' personal or business bank accounts, it's **important** that that is *stopped as soon as possible*: mixing your group's finances with anyone else's can lead to confusion from your group's beneficiaries and even accusations of personal gain.

You **must** have stopped any mixing of your group's and personal finances by the time you start to register as a charity (if you want to do that), and you should Minute that decision, so you have a formal record, when needed.

You will need to decide if online-only banking is best for your group; if you will be getting cash donations, you'd probably be better with local branch banking. Similarly, you need to decide if you need a Debit Card, if you need a mobile app, or other features of banking. You may find some banks offer free banking, but not all do.

You will need an account that requires two authorisations: two signatories for cheques or transfers, or a system where one Committee member agrees online spending and another authorises that. This may sound arduous, but having separate people is to safeguard you against accusation of personal gain or fraud.

You will probably need a "Club Account" or a "Community Account", possibly called a "Charity Account" (although you may need to already be a charity for that). The name and type of the account varies from one Bank to another, and we cannot advise on what's best. Some High-Street Banks welcome Club/Community customers, others may not, and we understand it varies enormously, often dependent on Branch Managers. Some suggestions: Best free bank accounts for groups; Money Matters.

The Charity Commission is aware of problems with charities' banking, and are working with the Banking Industry, although nothing is as yet resolved (October 2022)

End of part one:
That's most of the things you'll need to set up and run your group for its first year.

SUCCESS

Don't forget that **involve** Community Services provides a range of other services for voluntary & community groups, charities and other not-for-personal-profit organisations

Start-up & growth support for your charity	Training in a wide range of topics & on-demand	Funding advice & support with bids	Volunteer recruitment & support (in Bracknell)	Good governance for your group

reception@involve.community 01344 304 404 intrusted.community

Part two:
Running your community or steering group

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Your Committee might want to expand its numbers, especially if you only have three people, and you may need some different skills from people on your Committee.

invo**lve** Community Services has a **Skills Matrix for charity trustees** *(ask us for a copy)* some of which you may find applicable and useful for your group to look at your existing, and identify any missing, skills.

The best way to search for and successfully find new Committee members is to produce a short but clear description of what you want that new person to do (almost a "Role Description" but probably simpler). Using that Description, also produce a short advertisement and distribute that advert within your group, within your neighbourhood, within your community, even outside of those groups.

You can also freely post your advert online, using **in**vo**lve** Community Services' BracknellForestGetInvolved or Wokingham Volunteer Centre's VolunteeringWokingham. If your group has wider geographical coverage, you can sign-up (free) to CharityJob and post volunteer/Committee member adverts for free.

Once you get new Committee members, you can add ("co-opt") them straight away or wait until the AGM

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Your Constitution will state the minimum number of times per year your Committee must meet.

Each Committee meeting:

- ✓ must have an Agenda sent to the Committee in advance,
- ✓ must look at the Minutes of the last meeting and agree those,
- ✓ should discuss the next steps for your group,
- ✓ must look at your finances (ideally with a financial statement, or Income & Spending Account) to ensure you have enough money,
- ✓ should discuss how to get more money,
- ✓ and must give all your Committee members the opportunity to discuss all of these things. *Remember: everyone's equal!*

Chair	Your Chair should lead the discussions but not dominate them, making sure everyone who wants to speak does so, but make sure that no one dictates over the group, including the Chair ☺.
Treasurer	Your Treasurer should fully explain your group's finances and make sure everyone understands those, and sees or has copies of your most-recent Bank Statement.
Secretary	Your Secretary should take notes to make sure they can produce the next set of Minutes and make sure everyone gets a copy of those, and any other documents, in advance - 7 days is good, but more is better.

Here's a *sample* agenda for a Committee meeting, but change these and add your own items for discussion:

Formal title of the item	An explanation of what this does
Welcome, to all attending. Apologies, from any Committee members who can't attend	Introduces everyone, and makes sure the Secretary writes down names of who's there and who's not
Declaration of any conflicts of interests	If anything to be discussed conflicts with any Committee members' personal or family interests outside of the group, you need to tell the others *{more on managing Conflicts of Interest in our "**Setting Up a Registered Charity**" guide, where it's mandatory}*
Approval of Minutes of the last meeting	To check and agree that your Minutes were written down as a correct record
Matters arising from those Minutes	To see what actions were taken after the last meeting, by whom and what's still left to do
Financial report	What money you have, what money you need, how likely it is you will get that money
General, or operational, report	What your group did since the last meeting
Future plans	What your group wants to do, with a defined and agreed timescale
Any other business	Anything not discussed by now, but try to get your Committee members to let your Chair know about these before you start, rather than waiting until this point in the meeting
Date, time and venue of next meeting	To make sure everyone knows and turns up next time ☺

Your Committee meetings must be attended by a minimum number of Committee members (usually at least three, or more if your Constitution says more) and cannot make any decisions without that minimum number ("the quorum") being present.

Your Committee makes the big, strategic decisions about the current activity and future plans of your group.

BIG

Although your decisions should take the views of your beneficiaries and of other people who are not on the Committee into account, **your Committee has the full authority to decide** what will happen to your group and your activities, what happens to the money (as long as it's used for your beneficiaries or for your group's future plan), and each and all Committee members take individual full responsibility for all those decisions.

Your group should hold an Annual General Meeting, which will be described in your Constitution.

Your group should hold this approx. 12 months after that very first public meeting where you agreed the Constitution and it must be held within 15 months of that first date.

You should invite your "community", your members (if you have those), the 'public' if appropriate.

At the AGM, the Chair should speak to the attendees about the achievements of your group in those 12 months; they may have produced a written report to distribute to those attendees.

Your Treasurer should produce an annual financial account (can be simple = income and spending), distribute that to attendees and they may speak to the attendees about your finances.

Your Secretary should takes notes, to produce Minutes of the AGM. These will be distributed just before *next* years' AGM.

You may want to ask your members (if you have those) to agree the reports by voting, but unless your Constitution says you *must*, the choice is yours as the Committee.

It is usual for all the Committee to 'stand down' at the Annual General Meeting and offer your services as the Committee again, if you each want to. This is to give other people the opportunity to become Committee members.

Your Constitution may state, or your Committee may make, additional rules about who is eligible to stand as Committee members each time, and who can vote.

Those people attending the AGM who are eligible (see Constitution or your rules for eligibility) should vote for those Committee people who are standing for places on your Committee, one vote per person per Committee place. And if you've added (co-opted) Committee members since your last AGM, make sure they stand at this AGM
If you have more people standing as the Committee than you have places, you should rank the votes, the highest number of votes winning.

If you decide to eventually register as a charity, this procedure will likely change a little, to allow more continuity; that's explained more in our guide to "**Setting Up and Running a Charity**".

As your group isn't a charity, you probably don't have any other 'external' responsibilities, that is the requirement to report to or keep other organisations informed of your group and its activities. If you receive donations, especially from other groups, grant-giving organisations, etc., you will probably have to create a report to give them about how you've used their money, but you may not have to produce reports to anyone else; of course, you could *choose* to do so, maybe at your AGM.

Regardless of the size and scope of your group, you should create and update some simple policies about what you do, and procedures about how you do that. Examples would include Safeguarding (even if you don't work with children and adults with additional needs); Health & Safety; Equity, Diversity and Inclusivity; Data Security & Protection; Compliments & Complaints; Conflicts of Interest; Confidentiality. **in**vol**ve** Community Services has a **comprehensive list** of almost every policy you'd ever need (many you probably won't), and advice about those, although not the policies themselves.

Training and essential guidance
You may want to consider training for your Committee members. **in**vol**ve** Community Services offer an online trustees' training course (2 x 2hrs using Teams) several times per year, and although this is primarily targeted at *charity* trustees, much of it still applies even if your group isn't a charity.
involve Community Services always offer free advice, support and information for your Committee members and your whole organisation, with suggestions about how to run your group, find volunteers, raise funds, etc.