involve

MAKING A DIFFERENCE LOCALLY

Guide #2

A guide to setting-up a **Registered Charity** or

in England and Wales

changing your community or steering group into one

This Guide may work best if you already have an existing community or steering group; see our Guide #1 to setting-up those. Of course, you **can** just start with this Guide if you're confident about what you want your charity to do.

inTRUSTed

EFFECTIVE RECRUITMENT & SUPPORT FOR TRUSTEES

This guide is for groups that can be supported by **involve** Community Services: primarily those in Bracknell Forest and Wokingham Borough, or elsewhere in the Thames Valley. If you're outside those areas, please feel free to use our Guide, but you may get better support from similar organisations in your own area who are also NAVCA members.

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.

v51 Last updated 09/12/2025

Setting up a Registered Charity

https://www.gov.uk/set-up-a-charity

In order to set up and register as a charity, you need to fulfil the requirements of the Charity Acts 2006 & 2011, as well as updates to that in 2016 and 2022 (and some previous legislation that still applies). Charities in England and Wales are registered by the Charity Commission, and once set up, regulated by them. Thus, you need to clearly fulfil their requirements and that of those laws as a minimum.

The Charity Commission, and the National Council for Voluntary Organisations have guides on setting-up and registering a charity. You may even prefer those guides to this **involve** Community Services one.

The Charity Excellence Framework is a FREE source of guidance about all types of not-for-personal-profit orgs., not just charities, and includes DIY setting-up guidance. Small Charity Support is another free source; a YouTube video from the Bates Wells law firm; a YouTube video from Withers LLP, another law firm; the Charity Digital guide or a blog from 1st Foundations.

We suggest you first download this Charity Commission checklist, and follow any of the guides mentioned, including **this one** from **involve** Community Services.

Our guide is taken in part from those other guides, hopefully with more-detailed explanations and examples. We will suggest a *specific type* of charitable organisation that is relatively simple to set up, one that offers some protection from personal liability for trustees and is now the most-registered type of new charity (80+% of all new registrations).
There are other types of charity legal structures which ***involve*** *can explain separately, although not in this guide.*

You can do this yourself for free by following this Guide (or others), but it takes time, focus and effort.
You could get Solicitors who have Charity Law expertise, or other organisations and companies to set you up as a charity, although they will charge between £600 and £1500.
Examples *(these are NOT recommendations and not the only ones)* include [Blandy & Blandy](), [Charity Excellence Framework](), [Charlie Cattell](), [Mounteney](), [BusinessLegal Ltd.](), [OK Charity](), [Simply 3rd Sector](), or [Charity Expert]().
If your group has a clear "Christian ethos", you could pay [Stewardship](), who are a Christian charity, to create your new charity.

This guide is best for ***EXISTING*** community or steering groups who want to register as a charity in **England & Wales** (Scotland & NI are different). You will need some things in place before you start to Register.

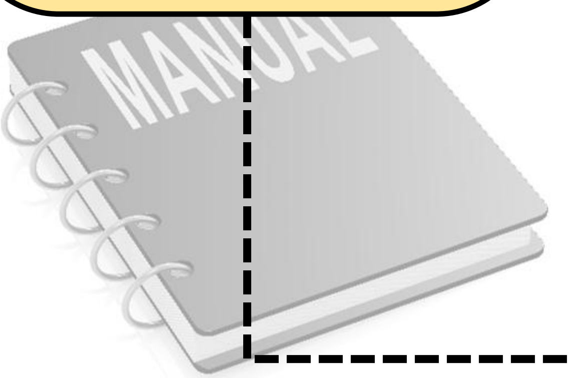
If your group is already working outside England and Wales, or your charity intends to do that, or is working with or sending funds to any overseas organisation, even if your group is based in E&W, there are some additional steps before Registration that are ***outside the scope*** of this simple guide.
Please speak with **involve** Community Services before proceeding any further, or search the [Charity Excellence Framework]().

Advice from Blandy & Blandy, a local law firm specialising in charities, including incorporation. (This reads like an advert, but is good advice nevertheless).
[Incorporating a Charity - The Process, Timescale and Cost for an Existing Charity]()

Please ask **involve** Community Services for guidance and explanations on any section below.

If your existing community or steering group is already undertaking "charitable" activities (broadly defined, often as "doing good for your beneficiaries, and not-for-profit") and has an **income of more than £5,000** per annum, you are **REQUIRED** by charity law and the Charity Commission to Register as a charity.

If your group isn't already set up with a Constitution, please see the separate **involve** Community Services' Guide #1 to **Setting up and running a group for good**, as *your initial steps* before charity registration.
You will be able to jump or exclude many of those steps, but you **must have a basic framework in place** before you start to set up as a charity. Ask **involve** for more information & help.



CHARITY COMMISSION
FOR ENGLAND AND WALES

If your group is **already** a Community Interest Company *(a social enterprise that's not a charity)*, existing Registered Unincorporated Charity, a Company Limited by Guarantee or another not-for-personal-profit legal structure, and you want to change your legal structure, this guide is ***not for you***. **involve** can advise about these: ask us!

You can look at the Charity Excellence Framework guide or read the Charity Commission information on how to change non-profit or charitable structures.
If your group isn't sure about its legal structure, or you are one of these groups, please ask **involve** for more information and assistance.

For this guide to setting up a new charity, **involve** Community Services assumes you want to set up as a **Charitable Incorporated Organisation**, one type of charity which offers a limit to personal liability for your Committee members, who will soon be called "trustees". In following this guide and wanting to set up as a CIO, you must register with the Charity Commission regardless of your income (the £5k threshold doesn't apply).

As your community or steering group is already set up, you will likely have a **Constitution**. You will have to ***change*** your existing Constitution into a version approved by the Charity Commission, but that shouldn't be hard, as all the decisions about your existing Constitution you took when you first set up as a group should generally still apply, although there will be a few more to take.

There are other Registered Charity structures, but some leave trustees open to more personal liability, or are much more-complex to set-up and manage. Again, if you don't want to set up as a CIO, please contact **involve,** see the Charity Excellence Framework guide or the full Charity Commission advice.

Charity Excellence FRAMEWORK

CHARITY COMMISSION FOR ENGLAND AND WALES

What's in a name?

You should check that the name of your proposed charity isn't similar or close to that of an existing charity. You may have done this when you first set up your group by searching the Charity Commission register for similar names, as they won't allow you to register the same or similar names (Cf. Naming a charity).

You should also search the internet for similar names of groups, organisations or companies, as not all UK charities need to be registered with the Charity Commission, and you don't want your nascent charity confused with another organisation, especially a commercial company, or for your registration to be refused.

What's in a name?
An amusing blog about charity names and getting the name right ☺

Obviously, it's up to you what you call your charity, and whether you want to describe or include your beneficiaries in that name, but the more-distinct your charity's name is, the easier it will be for your donors and your beneficiaries.

You will need to choose between the two types of CIO: (if the following isn't clear, ask **involve**)

whether your charity is governed and run *only* by your trustees (The **Foundation** Model).

or

whether you want a wider voting membership who can hold your trustees to account (The **Association** Model).

See below about voting members.

There are advantages and disadvantages to both models, and you have to decide at this point which is best for your future organisation: discuss with **involve**

It is possible to change from Foundation to Association Model once registered, but it's time-consuming. It is probably possible to change from Association to Foundation Model, but that would mean removing all your voting membership, and again would be time-consuming. Both changes would need additional approval from the Charity Commission.

About "members", those people who are **not** on the Committee:

- If your community group requires your beneficiaries or supporters to sign-up or register to receive your services, whether or not there's a cost for that, you may *call* them members, but they are really "beneficiaries".
- If those people can **vote** to elect your Committee, then they *are* "members" (voting members), and there will be a description about membership in your existing Constitution.
  In this case, if you have these voting members, you **must** choose the Association CIO model.

Charity Commission guidance on CIO Association and Foundation Models In our opinion, this guidance isn't very clear – ask **involve** for more clarity and examples, if you're unsure.

You will need to use one of the Charity Commission model templates for your Constitution, for the type of CIO you want. This is not your existing Constitution for your community group, but you will probably want to include many of the same options as when you first set up your group.

It's STRONGLY advised to use the Charity Commission templates and amend any clauses that are unnecessary for your group or its operation *(that amendment is expected by the Charity Commission and all are highlighted in the template versions **involve** can supply).*

The templates are clear about what can be amended, added or deleted, and what can't.

Although you *could* use their template just as guidance and then write your own Constitution, the Charity Commission are likely to take at least double the time to register your charity and will refuse if specific clauses are omitted or changed. **Advice: use a CC template!**

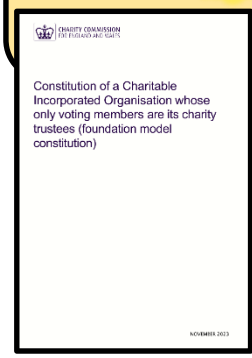
Trustees only

[Foundation Model](#)
(downloads a Word version with the guidance notes, which you **MUST** read).

[Association Model](#)
(downloads a Word version with the guidance notes you **MUST** read).

Voting members & trustees

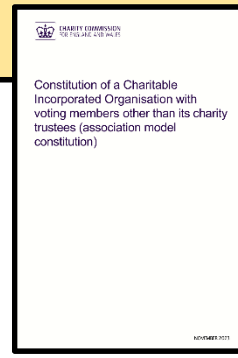
involve has a version with all the optional amendments *("how often do we meet?" etc.)* highlighted to ensure you make all those changes.


CHARITY COMMISSION FOR ENGLAND AND WALES

Constitution of a Charitable Incorporated Organisation whose only voting members are its charity trustees (foundation model constitution)

NOVEMBER 2023

involve has a version with all the optional amendments *("how often do we meet?" etc.)* highlighted to ensure you make all those changes.


CHARITY COMMISSION FOR ENGLAND AND WALES

Constitution of a Charitable Incorporated Organisation with voting members other than its charity trustees (association model constitution)

NOVEMBER 2023

involve offer a "clause check-up" service, if needed, and we can advise and even review those amendments, although each amendment must be your group's decision.

You can ask us to meet with you to help
We can also meet via video

Once you have completed any amendments, additions and variations of your Constitution, you will need to meet as a group of trustees, formally agree the Constitution and Minute that decision.
This is the "date of adoption" of your Constitution.

You will need to create a final PDF copy of this document, to upload.

All your trustees should have their own copy of your completed new Constitution, or have easy access to a copy.

What are we doing? How do we do it?

You should check that the **Objects** or purposes that you created for your community group are still what you feel describes your objectives, as it is *very difficult* to change your Objects once you're registered as a charity. You should read the Charity Commission description about charity purposes.

For your **Objects**, you should choose no more than three sub-headings at most *(should probably be one)*, from that list of 15 top-level headings of Charitable Purpose.
The Charity Commission will question your clarity of purpose if you choose too many and may refuse to register your group as a charity.
They will also not understand any jargon or local references, so keep it simple: WHAT DO YOU DO? HOW DO YOU DO IT?
You might want to look at other charities with similar aims who Registered recently, via the Charity Commission website, to 'borrow' from their Objects or purposes.

You should look at the Charity Commission's guidance on writing your Purposes, and you can ask **involve** Community Services for our advice, but, as always, it's your group's decision.

Public Benefit requirement

You **must read** the [Charity Commission guidance about Public Benefit]. This clearly relates to your charitable purposes, your Objects, and what you will be doing for your beneficiaries. What you do and say you do as a charity must clearly demonstrate what the benefit is to the public and how you will constantly achieve that.
(Later on, Trustees will have to annually report on how your charity provides public benefit, although that's not difficult if you're set up properly).

You should create an explanation of your public benefit, as a separate document, as you will need all the details in this during the online registration process. Having it prepared makes it easier, and you can upload this as well.

In 2021, 53% of applications to register a charity were refused by the Charity Commission; in 2022, 60% of applications were refused & in 2023, 63% were refused. Many of those refusals were about unclear Public Benefit ☹

Having links to accredited research, studies and online 'proof' of the need for your service and the benefit it provides, will make it easier to convince the Charity Commission

☹ Just saying "we will benefit the public in AnyTown by providing a playgroup" will **not** be sufficient.

☹ Just saying "we will help people in poverty who come us" will **not** be sufficient because you haven't explained how you know *who* they are, and can evidence that those people are in poverty.

We hope this gives you some indication of the basic principles of the Public Benefit requirement, but please read the CC guidance to be sure.

The Charity Commission say (in that guidance) that you need to *understand* **Public Benefit** and you **must** explain to them when you apply online:

- ★ The Benefit – how what you do benefits ‘your public’, what **evidence** and **proof** you have of that, *not just your opinion*, or even just the opinion of those benefitting

- ★ The Public – who your charity will benefit, how that isn’t a small set of people; you must have **evidence** and **proof** of who you expect to benefit. *(Although if your charity uses the “prevention of poverty” clause, you may need to only clearly demonstrate The Benefit, above).*

CHARITY COMMISSION
FOR ENGLAND AND WALES

Public Benefit

What the Charity Commission see as “evidence and proof” during registration is harder to define because it depends on what you want your charity to do, but if you’ve done some research, a survey, or have written evidence from other people, including statistics or reports, you can also refer to that in your Public Benefit summary. But be clear you must provide that **genuine evidence**, not just your **opinion**.
In your application you can also upload the evidence to the Charity Commission, but you’ll also need to refer to it in their form, ideally with an online link and date.
Do this research, etc., before you start the process!

You will need to check how many of your existing Committee members want to become trustees; remember you need at least three people, ideally more than that (five trustees is a good number to start). Although the duties are effectively the same as for your community group, the added legal responsibility and reporting requirements to the Charity Commission may put off people who just want to volunteer for your day-to-day operations.
Note that a CIO is an incorporated structure which offers a limit to personal liability to trustees, more-safely allows the organisation to employ people, and take on leases and contracts, etc., and grow, if you want that in the future.

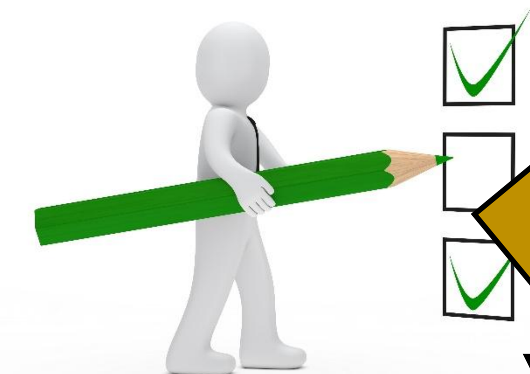
For a CIO, all of your trustees must be over 16 years' old, but we'd recommend that the majority are over 18. Trustees must be eligible to be trustees: eligibility criteria.

1. If the idea of originally forming your community group, and thus the charity, came from one person (the "founder"), they may want to become a trustee, even become the charity's Chair, and this is fine.
2. If that "founder" wants to (eventually) become a paid Manager/CEO/employee-in-charge, that's also fine *(once you have the money for that ☺).*

BUT that person cannot be both:
You cannot have a trustee who is a paid employee;
You cannot have a paid CEO who is a trustee.
You must decide which role your founder wants!

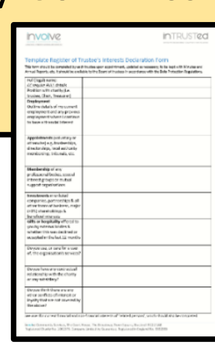
If your founder becomes a trustee, they will join the group that makes the highest-level strategic collective decisions about your group, your charity. They thus have a lot of influence, alongside and **absolutely equal** with all other trustees.

If your founder becomes the paid employee/ CEO/equivalent and thus **not a trustee**, they will also exert some influence over those high-level decisions, have more understanding and full authority over all day-to-day operations, but must understand that **trustees are the ones** who will make the high-level strategic decisions.



Both trustees and the CEO have 'control' and influence

involve can provide a sample **Register of Trustees' Interests**, which is good practice for each trustee to complete for *your own records* (you don't need to send this to the Charity Commission). The Commission say that Conflicts of Interest aren't wrong, just not knowing about them. If you use that record, your charity will then know of any potential Conflicts of Interest before they come up. The Register will also hold information about "connected parties" - family members, etc. of trustees – whose details you may eventually have to give to the Charity Commission if they, or your trustees, are supplying goods or services to the charity.



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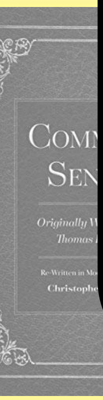
It’s not good practice for trustees to be closely-related as family members to other trustees. Some older-established charities may have family-related trustees, but the Charity Commission will now ask for explicit detail about how you will manage any Conflicts of Interest, and how you will ensure there is enough of a majority of ‘unconflicted’ trustees at every meeting. They may refuse Registration if you can’t convince them.

You need a majority of trustees who live in the UK; you *can* appoint non-UK residents as trustees, but you’ll need to ensure they understand they are bound by UK law, not only charity law, when they are acting as trustees. You’ll also have to think about how you’ll communicate with them and ensure they are fully engaged with all other trustees and your meetings. The Charity Commission will take longer to Register your charity if any trustees are not in the UK. **All trustees are equally responsible for every other trustee’s and the group’s actions.**

You must have **at least three** people who will become your trustees. As with your community group, you’ll have a better Board of trustees and organisation if you have more than three, possibly between five and eight (you can have more, but it might get unwieldy in making decisions).

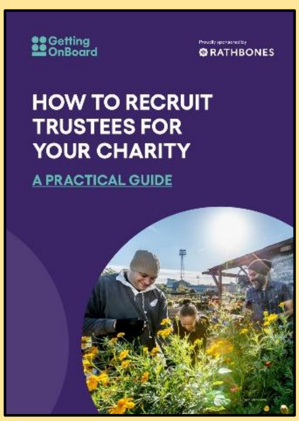
The more-diverse your Board is, the better: by diversity, yes we do mean age, ethnicity, gender, etc., but we also mean ***diversity of thought***. If everyone thinks the same, we won't have trustees who constructively challenge our decisions and we'll end up with 'groupthink'.
And diverse trustees obviously bring diverse experiences and knowledge, bring more 'common sense', a trait much-needed on trustee Boards ☺



Getting OnBoard. …ging the face of trusteeship

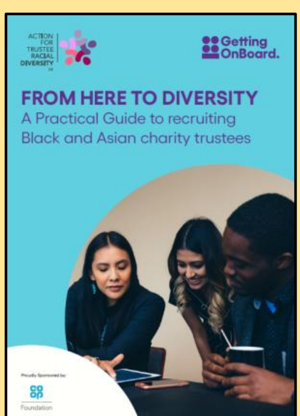
Unfortunately, the easy-to-access source of good trustee recruitment information, the charity "Getting on Board" closed in 2024 due to lack of funding ☹, and you can no longer download their excellent guides.
However, **involve** has copies of all of their main guides – intrusted@involve.community

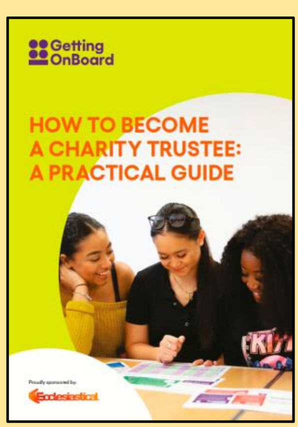
How to recruit trustees for your charity



How to diversify your charity's Board

How to recruit Black and Asian trustees for your Board



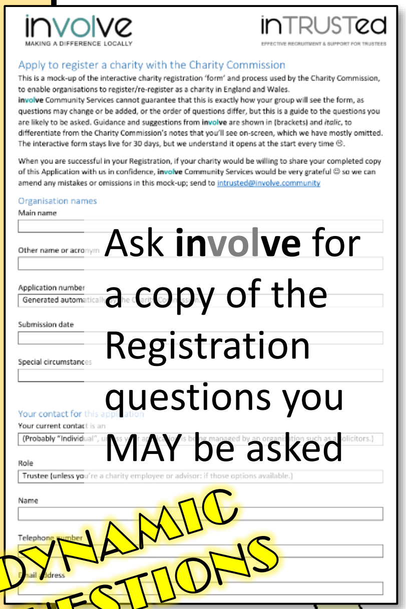


How to become a charity trustee

The process of registration

Once you start the registration process, you will need to give the Charity Commission all the following personal information about each of your trustees, although only your trustees' names are made public. It's worth asking your potential trustees and writing all this down before you start *(please keep this information safe, though).*

- Full name and title (Ms., Mr., etc.)
- Date of Birth
- Nationality
- Full address, including postcode (you may be asked how long a trustee has lived there, and will have to provide details of previous addresses if requested)
- Contact email and/or phone
- If your trustee is also a trustee of another
- charity in England & Wales
- Which one of your trustees is the Chair
- The date each trustee was appointed as a Committee member or trustee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Apply to register a charity with the Charity Commission

This is a mock-up of the interactive charity registration 'form' and process used by the Charity Commission, to enable organisations to register/re-register as a charity in England and Wales.
involve Community Services cannot guarantee that this is exactly how your group will see the form, as questions may change or be added, or the order of questions differ, but this is a guide to the questions you are likely to be asked. Guidance and suggestions from **involve** are shown in (brackets) and *italic*, to differentiate from the Charity Commission's notes that you'll see on-screen, which we have mostly omitted. The interactive form stays live for 30 days, but we understand it opens at the start every time ☹.

When you are successful in your Registration, if your charity would be willing to share your completed copy of this Application with us in confidence, **involve** Community Services would be very grateful ☺ so we can amend any mistakes or omissions in this mock-up; send to intrusted@involve.community

Organisation names

Main name

Other name or acronym

Application number

Generated automatically by the Charity Commission.

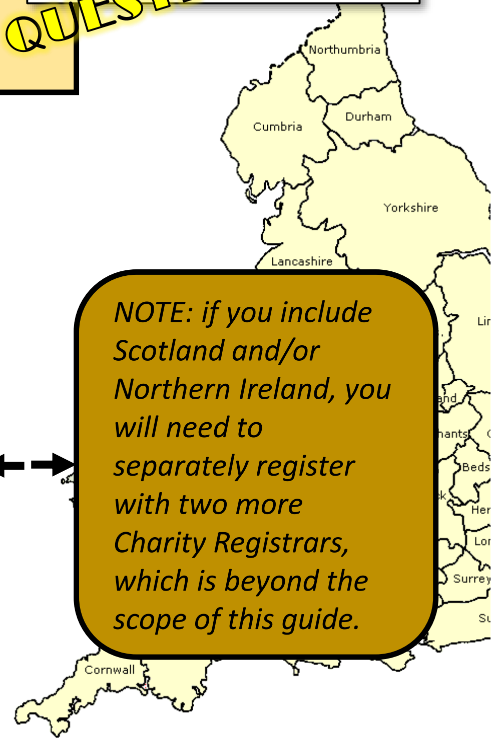
Submission date

Ask **involve** for a copy of the Registration questions you MAY be asked

DYNAMIC QUESTIONS

Where charities can operate is defined by geography.
You will need to have decided upon your geographical "Area of Benefit", which is defined by Local Authority (Council) areas. You can say "England & Wales" if you have that wider area, otherwise, you'll have to select each Council area one-by –one.

NOTE: if you include Scotland and/or Northern Ireland, you will need to separately register with two more Charity Registrars, which is beyond the scope of this guide.



You'll may already have a Bank Account ("Club" or "Community"), set up when you were first a community or similar group.

If you have been using your or someone else's **personal** Bank Account for your group's finances, **STOP** that, and set up an account for your Group NOW!! You cannot use a personal Account for your group as you could be accused of personal gain or fraud ☹

What to note when setting up your group's Charity Bank Account:

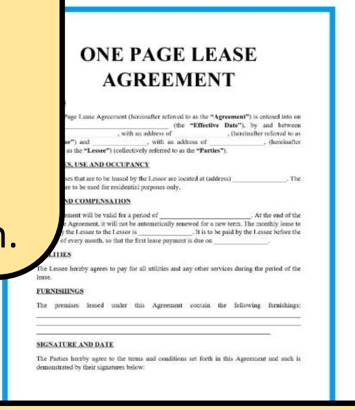
- You must have a dual-authorisation account (at least two unrelated people).
- It's good to *also* have at least 2 people as your contacts with your Bank.
- You may need to pay for your Bank Account: what is the cost per month?
- Will you have cash or cheque income? You'll need local branch Banking or easy access to that (some Post Offices offer this).
- Do you need your Account to integrate with your Accounting software?
- Your Bank will need copies of your Constitution and Minutes of meeting where you agreed it, and when you agreed to set up banking.
- *Your Bank may need copies of financial management procedures (for bigger groups) and similar financial safeguards.*

Some groups have found some difficulty setting up such dual-authorisation Bank Accounts, but see this Voluntary Organisation Banking Guide, which gives good impartial advice. **FAQs**
You may be able to persuade Branch Managers where you bank personally to set you up a Club, Community or Charity Account.

Charity Commission guide to banking.
The Commission **strongly prefer** your group to have an existing Bank Account for your group when your Register, which will probably be a Club or Community Account. Your Bank should change that to a Charity Account once you're Registered.

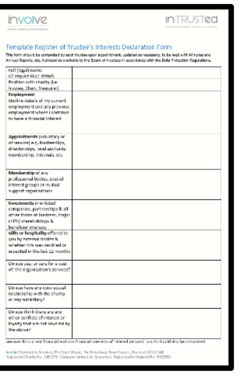
To Register as a charity, you'll need all your bank details: Account name, Bank name, Bank address, Sort Code and Account Number.
You may need PDF copies of a recent Bank Statement.

If you're using premises to deliver your services or even just as an admin/office base, you'll need details of who owns the property, whether the owners are connected to your organisation and how if they are, and you'll have to explain how you use it (rented/leased/pro-bono, etc.) and how often.



If any of your trustees or any of their family own or live in those premises, you must also explain that connection and costs, provide a PDF copy of the agreement (or lease) with your charity, the PDF Minutes of the meeting where it was agreed by trustees that this is in the best interest of the organisation, plus an explanation of how joint costs (energy, rent, etc.) are allocated/shared.

If your organisation is intending to buy goods or services from a trustee or any of their family members, you will need to give details of who you pay and their relationship to the trustee, plus PDF Minutes of the meeting explaining why and when your trustees agreed to this.
You'll now see that the Register of Trustees' Interests is a useful record of trustees and family members, if there are connections to your premises, good or services supplied to your organisation, so that all other trustees know about that.



You will need to have outline ideas about how your charity will be funded for the future, although you won't need precise details. The online application will ask questions about:

If you're intending to apply for Gift Aid. We strongly suggest you say "yes", as it gives your charity an additional 25p for every £1 donated by a UK taxpayer, at no cost to you or your donors.
You'll have to register separately with HMRC for this and that may be easier after successful charity Registration.

You will have to give some details about your Local Authority if you're intending to apply for charitable Business Rate Relief: your answer will very likely be 'yes' if you'll be paying Business Rates for your premises. *Later, you'll need to contact your local Council to apply for that Rate Relief.*

If you're intending to ask for public donations, you'll have to state how you will identify and verify donors, and any conditions they may attach to their donation. You could say you'll ask donors of above a set figure (£10? £50? £100?) for their full details; for Gift Aid purposes, you need such information, anyway.
More information Know Your Donor.

If you're intending to apply for grants, who your likely sources might be.

If you're intending to charge for services or membership, what is offered for those charges, how much you expect will be charged and how trustees have agreed that figure, if it's potentially unaffordable for some people.
Of course, you don't have to charge your beneficiaries anything.

Remember: DYNAMIC QUESTIONS will change depending on your answers

If you're intending to ask for corporate donations, and from which companies; if you're intending commercial sponsorship, what the arrangement is and why it's in the charity's best interest.

Less likely at this point, but if you intend to use professional fundraisers, what the arrangement is and why it's in the charity's best interests.

Summary

Charity Registration link Charity Commission printable guide

	To register online, you will need:
1	A copy of your charity's Constitution, which must be fully completed, legible, in PDF (It must be a November 2023 version) and the date of adoption
2	Your charity's "Objects", its purposes, as written in your Constitution, and in accordance with Charity Commission guidance. Your "Classifications" for your charity (CC will ask, but these are easy)
3	Your group's contact details, including a postal address, postcode, and the organisational email address
4	All trustees' full personal details *(page 17)*
5	Details of your group's Bank Account *(page 18)*
6	A PDF of your group's most-recent accounts if available
7	Your defined geographical "Area of Benefit", as above, by Local Authority (top-tier: County, Unitary or Metropolitan Borough) *(page 17)*
8	Your answers to how you provide public benefit; how you have evidence that is more than just your, or your beneficiaries', opinion; what proof you have of that; references to proof or weblinks, if possible *(pages 11, 12)*
9	Details of your premises, as above *(page 19)*
10	Answers to questions about trustees or family members' supply of goods or services; PDF copies of Minutes agreeing for trustees doing this *(page 19)*
11	Answers to questions about your funding *(page 20)*
12	Printed trustee declaration forms, signed by each trustee, scanned as PDF

The online process doesn't have to be completed in one session; you can save your application for up to 30 days (although it always reopens on page one ☹).

That should be enough for the Charity Commission to consider registering your organisation as a charity.

This is **involve**'s opinion and we can't guarantee it's enough for the CC

It is not at all unusual for the Charity Commission to come back with questions or to query your application; **don't be put off by that**

What can cause the Charity Commission to more-closely examine your application?

- Incomplete or unclear application
- Concern about your Public Benefit
- Overseas activities
- Relationships with non-charities
- Political activity/campaigning
- Human rights or environmental action…

You can ask **involve** for advice and explanations of those questions, if needed, and although the Charity Commission questions/ feedback may be complex, it's also comprehensive.
You can challenge any of their wrong assumptions, and you should correct anything they request you do, as long as it fits with what your charity wants to do.

If they point-blank refuse your application (they will give precise reasons) you should consider their reasons. You could appeal to the Charity Tribunal, but you'll need expert legal advice to do so. It may be better to discuss those reasons with **involve**, make any appropriate changes they suggest to your Objects, Constitution or to your Public Benefit statements, and start all over again.

They can Register non-complex applications in 48 hours, but if they have queries, or your application isn't clear, or you have complex Objects or other "complications", they can take up to 120 days (as at December 25), because of high numbers of applications and low numbers of their staff.

But this is just the beginning ☺

Governing and running your charity

Your Board of trustees' meetings will be similar to your previous Committee meetings; your new Constitution will give more precise details and rules, which you must follow. Your Minutes of meetings will continue to be produced, and these are for your own trustees' record (they don't need to go to the Charity Commission; but if things ever go badly wrong ☹, they may want to see these).

Your Annual General Meeting will be similar to your community group's AGM, but will be slightly more-formal, as defined by your new Constitution.
In that Constitution, you will have defined those "terms of office" of trustees, which will be longer than your previous Committee members' (which were probably a single year), most likely three or four years, possibly with some limits on the numbers of consecutive terms of office.
Your Constitution will give more details of that, as these terms, and limits, will have been decided by you when you amended and added to your CIO Constitution before Registration.

Your charity must produce a Trustees' Annual Report. It is usual that your Chair leads the writing of that report, often in collaboration with other trustees (and employees, if you have these).

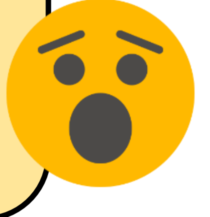
Your Report must include, as a minimum, names of all your trustees, a statement about how you deliver Public Benefit and how you manage your financial Reserves; you can include much more (Charity Commission guidance and template Annual Report, if you want those), or ask **involve**.

Your charity must also produce its Annual Accounts, have these "independently" examined by a financial professional, and that person's written approval added to the Accounts. Some Examiners offer less-expensive or even pro-bono examination of small charities' accounts. It is usual that your Treasurer works with your Independent Examiner to get your accounts ready for presentation, but all trustees should be kept informed. Trustees, usually Chair & Treasurer, sign those Accounts and Annual Report, plus the Independent Examiner.

You must combine your Trustees' Annual Report and your Annual Accounts into one PDF document, for upload to the Charity Commission.

You must present the Report and Accounts to your AGM (for approval by voting members if you are an Association CIO).

You must then upload it to the Charity Commission website, within 10 months of the end of your financial year. Failure to submit these documents, *even by one day*, is displayed on the Charity Commission public record of your charity for at least five years, which means your beneficiaries and funders can see this.



You will also have to complete your Annual Return on the Charity Commission website, which is an online set of questions, including income and expenditure summaries, plus other details about your governance and operations (you will have to complete this ***before*** you can upload your Annual Report and Accounts).

You may choose to upload your Trustees' Annual Report and Accounts to your own website and use it in your publicity, which is why it may be useful to include more detail of what your charity has done, plans to do, and other information.

Training and essential guidance

Ask for a copy of the "governance jargon buster" from **involve** Community Services.

Training for new (and longer-standing) trustees should be one of your priorities.
involve Community Services offer an online trustees' training course (2 x 2hrs using Teams) several times per year.
There are other sources of training for trustees.

You may want to consider financial-knowledge training for trustees *(see next page)*, as this is an area where some people's knowledge may be lacking, and ALL trustees are responsible for your finances.

involve Community Services always offer **free** advice, support and information for your trustees and your whole organisation, both its governance and its operations.

The Essential Trustee is the primary guide from the Charity Commission that all trustees must follow. There's a Quick-read version too. If you haven't looked at either version of this yet, you should!

All trustees should read (or watch the videos) all Five-Minute Easy-Read Guides:
Charity purposes and rules
Making decisions at a charity
Managing charity finances
Managing conflicts of interest in a charity
What to send to the Charity Commission and how to get help
Safeguarding for charities and trustees
Campaigning & political activity

More resources

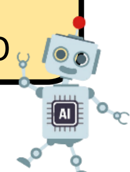
You may want to consider the free-to-join Charity Excellence Framework, which provides information and advice about every aspect of charity governance, operation, management and fundraising (and much more).

Your trustees have responsibilities for **every aspect** of your charity's governance. One of the many important areas is your *understanding* of trustees' duties about your fundraising.

It will be worth your trustees looking at the Charity Governance Code once you're more established. This isn't a mandatory standard, and is independent from, but *highly recommended* by, the Charity Commission, that sets a range of questions *and solutions* to trustees about how you govern your charity.

How to stop worrying and love finance. Many free downloadable resources, advice and training about all parts of charity financial management from Embrace Finance

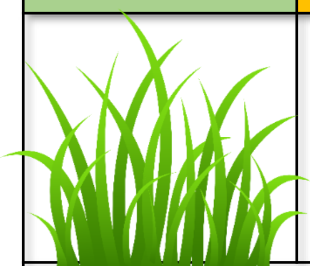
Cybersecurity guides and resources from NCVO



The day-to-day governing of and running your charity is all covered in Charity Commission guidance (from "The Essential Trustee", through to detailed guidance on *every* aspect of your charity).

And, although we're not experts here at **involve** Community Services, we probably know someone, who knows someone, who knows more… Ask us intrusted@involve.community

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

If you find ‘external’ links, such as to the Charity Commission resources, don’t work, please let us know, so we can fix this guide, correct as at December 25.
intrusted@involve.community