

# Key questions for trustees managing their charity's connection to a non-charity

## Recognise the risks

How does the connection with the non-charity benefit our charity?  
What are the risks for our charity?  
Have we assessed and addressed the risks?  
When is the next review of the risk assessment?

**You must only further your charity's purposes for the public benefit, not the aims of the non-charity**

## Don't further non-charitable purposes

Do we understand the scope and limits of our charity's purposes?  
Is funding from or to the non-charity restricted to furthering our charitable purposes?  
If we invest in a subsidiary - can we justify the investment, do we monitor our investment?

## Avoid unauthorised personal benefit and address conflicts of interest

Have we identified and addressed any conflicts for any of our trustees who:

- are appointed by the non-charity
- are on its Board
- work at the non-charity
- have another link to it?

Have we got approval for any trustee benefits that come from the connection?

## Operate independently

Are we free to make our own decisions in the best interests of our charity?  
Do we know when we wouldn't agree funding or other arrangements with the non-charity?

**You must act only in your charity's best interests**

## Protect your charity

Are we satisfied that our arrangements with the non-charity protect our charity's assets, beneficiaries and reputation?  
Do we have appropriate written agreements?  
Do we protect our charity's position when:

- sharing our resources with the non-charity
- sharing the non-charity's resources
- communicating jointly?

## Maintain your charity's separate identity

If we share our identity with the non-charity, how is this in our charity's best interests?  
Have we identified and addressed the risks?  
Do our donors know which organisation is asking for their support?  
How do we help people outside our charity to understand that we are separate from the non-charity?