

Public meeting: Norwich

Protecting your charity

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What do you need to protect?



- Assets
- Purposes
- Beneficiaries
- Reputation
- Independence

How do you protect?



1. Know your responsibilities
2. Good financial controls
3. Good governance
 - Clear purpose
 - Decision-making
 - Record-keeping
 - Policies & procedures

4. Think about reputation

Always act solely in the best interests of the
charity

Know your responsibilities



- Trustees are collectively responsible for the day-to-day management and control of a charity
- Must ensure charity is:
 - Solvent
 - Well run
 - Delivers its charitable purposes for the public benefit
- Compliance, duty of prudence and duty of care

Financial controls



- Good financial controls
- Budget planning and monitoring
- Clear policies and procedures
- Clear records
- Segregation of duties
- Review and monitor
- Question and challenge

Good governance



- Collective responsibility
- Follow governing document
- Clear policies and procedures
- Make good decisions
- Manage conflicts of interest
- Keep clear records
- Take advice

Reputation



- Everything you or your charity does/doesn't do or is associated with will impact on its reputation
- Failure to protect the charity's reputation can lead to a loss of support – donations, funders or volunteers
- Need to do things right and be seen to do things right
- Tell people about what your charity does

How do you protect your charity?



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Help is available



- www.gov.uk/charity-commission
- Local infrastructure organisations
- Umbrella bodies
- Professional advisers

Scenarios



Scenarios: what to consider



- Consider the scenarios in your group
- For each scenario:
 - Think about the questions:
 - a) How can the trustees solve the problem?
 - b) How could the trustees have stopped the problem from arising?
 - Pick the top three things the trustees need to do to protect the charity
 - Feedback one of those tips with reasoning