

Things you need to do:

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Step 1: Write your charitable objectives

During this step you will set out in writing what you want to achieve as a charity.

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I've written my outputs and outcomes

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I've written my charitable purposes

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Step 2: Working out your structure

During this step you'll get an understanding of which type of structure you'll need.

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I've decided which is the most appropriate structure for my charity

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I understand how to change structure if I need to

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Step 3: Recruit your trustees

During this step you will understand how to bring together the right trustees for your charity.

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I've read the Charities Act Requirements

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I understand the financial responsibilities of trustees

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I have prompted my trustees to identify and make known any conflicts of interest

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I've provided my trustees with the "Essential Reading for Trustees" resources

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Step 4: Write a governing document (or constitution)

A charity's governing document acts as a rulebook. In this section you'll learn how to write one.

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Step 5: Money, money, money, – financial management

During this step you will start taking vital steps towards having your finances in order.

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I have opened a Charity Bank Account

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I have worked out the financial responsibilities and their context

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I have begun setting up my financial records

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I've worked out the systems, budgets and people I am going to work with

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I have created templates for my financial records

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I understand the Legal Stuff behind my finances

What to do next:



Keeping a minutes book

Keeping a minutes book is essentially just keeping a record of all your important discussions and decisions at meetings. It might sound a bit tedious but in some cases (such as if your charity is a company or a CIO, or your governing document says so) it is a legal requirement. Also, it is actually really useful for your charity.



Writing policies and procedures

Policies and procedures guide the day-to-day activities and governance of your charity. Most grant giving bodies need charities to produce certain policies and procedures before they will donate any money.



Register your charity

Congratulations! By now, you're as ready as you'll ever be to set up your charity. You can now register online with the Charity Commission.