


## Guidance Leaflets & Example Policies

Small Charity Support produces numerous (more than 40 at the last count) free-to-download-and-use guidance leaflets covering most of the issues encountered by the trustees of small charities.








# Guidance Leaflets

Small Charity Support produces numerous (more than 40 at the last count) free-to-download-and-use guidance leaflets covering most of the issues encountered by the trustees of small charities.

Some of the leaflets (marked ) appear in more than one section.






## The Roles & Responsibilities of Small Charity Trustees



- ✓ The Roles & Responsibilities of **ALL** Trustees 
- ✓ Typical Roles & Responsibilities of the Chair   
{Including managing meetings}
- ✓ Typical Roles & Responsibilities of the Treasurer   
{Including preparing regular reports to Trustees}
- ✓ Payments to Trustees (and connected persons)
- ✓ Minutes  {Recording discussions & decisions effectively}
- ✓ Preparing the Trustees Annual Report & Accounts 



## Managing a Small Charity

- ✓ The Roles & Responsibilities of **ALL** Trustees 
- ✓ Outputs & Outcomes  {What the charity does, and what it achieves}
- ✓ Programme/Business Planning 
  - ✓ Programme/Business Plan Template

### Managing Meetings

- ✓ Typical Roles & Responsibilities of the Chair 
- ✓ Minutes  {Recording discussions & decisions effectively}

### Managing the Money

- ✓ Typical Roles & Responsibilities of the Treasurer 
- ✓ Budgets & Cash Flows 

*For more information, see "Simple Accounts for Small Charities", below*

- ✓ Preparing the Annual Report & Accounts 

**ALL** charities, regardless of their size **MUST** prepare Trustees Annual Reports & Accounts and make them available to the public on reasonable request **REGARDLESS** of whether they are required to submit them automatically (ie: without being requested) to the Charity Commission.

## Example Policies & Procedures for Small Charities

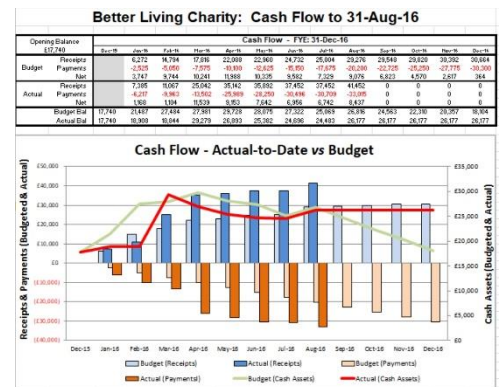
18 downloadable/editable example policies & procedures which you can adapt to your charity's own requirements.



## Simple Accounts for Small Charities









How to prepare and manage the finances of a small charity in accordance with Charity Commission requirements WITHOUT having to use complicated accounts procedures and professional accountants or financial advisors.

- ✓ What accounts ALL charities MUST keep;
- ✓ Typical Roles & Responsibilities of the Treasurer 
- ✓ Recording & Managing Your Charity's Funds
- ✓ Budgets & Cash Flows 
- ✓ Financial Controls CheckList
- ✓ Bank Account 
- ✓ Preparing the Trustees Annual Report & Account 
- ✓ Simple Accounts Spreadsheet {MS-Excel} & Instructions



## Starting & Registering a Small Charity

Guidance on what you will need to have and to do to set up a new small charity and get it registered with the Charity Commission.

- ✓ Introduction & Overview;
- ✓ Outputs & Outcomes 
- ✓ Charitable Purposes/Objects;
- ✓ Governing Document
- ✓ Roles & Responsibilities of Trustees 
- ✓ A "Minute" Book 
- ✓ Bank Account 
- ✓ "Simple is Beautiful" - Managing Charity Accounts 
- ✓ Programme Planning 
- ✓ Policies & Procedures 
- ✓ Registering with the Charity Commission.
- ✓ Preparing the Trustees Annual Report & Account 



## Quiz ScoreBoard

Not a leaflet - just a bit of fun !

A downloadable Quiz Scoreboard {in open-source MS-Excel}

If your charity runs quizzes, whether as social events or fundraisers (or both) this might be of interest

Charity Name - Quiz Evening										
Round	Table									
	A	B	C	D	E	F	G	H	I	J
1. General Knowledge	3	4	0	8	7	5	7	6		
2. Music	7	5	10	3	7	4	7	4	10	
3. Television	8	7	7	5	9	7	6	7	7	
4. Around the World										
5. Mix and Match										
6. Sport										
7. Films										
8. General Knowledge										
<b>Total Score</b>	<b>18</b>	<b>18</b>	<b>20</b>	<b>16</b>	<b>23</b>	<b>21</b>	<b>20</b>	<b>27</b>	<b>25</b>	
9. Small Charity Support	A	B	C	D	E	F	G	H	I	J

# Example Policies:

Some ideas to get you started on writing your own policies.



## What are the example policies for?

Every organisation needs a collection of Policies & Procedures to guide its day-to-day activities & governance. And these days most grant-giving bodies require charities and community groups to be able to produce any number of policies before they will donate any money.

Starting with a blank sheet of paper and "reinventing the wheel" can be a lengthy and tedious process. So it is hoped that this collection of example policies - most of which have themselves been modified from the policies of others - will simplify the process a little by providing some ideas to get you going.

### But will they be right for my charity or group?



Every organisation is, of course, different. So these examples are unlikely to be exactly what you require for your situation. You will therefore need to adapt them to suit your own particular needs and situation. In some cases the required modifications may be quite trivial. In other cases (particularly for compliance with GDPR) pretty much the whole document will require re-writing.

But, hopefully, they will help you over those most difficult of initial hurdles :

*"Where do I start?" & "What do I need to include?"*

### So how do I start?

The examples are all downloadable as either PDF files or as editable MS-Word<sup>(R)</sup> documents.

On the website, simply click on the relevant icons ( for PDFs,  for Docs) next to the titles that you are interested in. You can then adapt them as necessary to fit your own particular situation.

If you have any comments/suggestions (and, particularly, criticisms) that would make these example policies more useful to others we would be delighted to hear from you at [enquiries@smallcharitysupport.uk](mailto:enquiries@smallcharitysupport.uk)

**Bullying & Harassment**

**Code of Behaviour**

**Conflicts of Interest**

**Equal Opportunities**

**Financial Management**

## **GDPR**

**Data Management Policy for a Small Charity**  
**Example Privacy Notice for Charity Trustees**  
**Example Privacy Notice for Participants in Simple Activities**

## **Large Legacies & Donations**

A suggestion for when the occasional receipt of a large legacy threatens to distort the charity's resources and cash-flow.

## **On Becoming a Charity Trustee**

This is a brief over-view of some of the key issues that potential new trustees of a charity need to know about and includes links to many of the more detailed guidance publications available.

## **Reimbursing Expenses & Purchases**

Some notes and templates you might find useful.

## **Reserves Policy**

Unlike the other guidance leaflets in this series, this leaflet is not so much a "template" for a Reserves Policy as guidance on how to create one. It is therefore available only as a PDF.

## **Safeguarding Children & Young People**

### **Safeguarding Vulnerable Adults**

### **Safe Recruitment**

### **Supervision**

### **[Volunteering](#)**

A link to the WCVA model policy

### **Whistle-Blowing**

## **Intellectual Property and Copyrights**

All the materials on this website are the intellectual property and copyright of Small Charity Support. All Small Charity Support's services and materials are made available free of charge and royalties for use by *bona fide* small charities and not-for-profit community organisations. **Use of the materials, directly or modified, for commercial or for-profit purposes is NOT permitted.**

## **Can't Find Exactly What You Are Looking For Here?**



The Gloucestershire Rural Community Council website has some policy templates that you might find useful. Just click on the icon.