

Effective trustee – baseline questions

Name of charity		Role	
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Governance

What is your governing document?	Company limited by guarantee	A scheme of the Commission	Unincorporated – association with a constitution
	CIO	A trust deed	Other
What is your purpose			
Are you registered (give number)	Yes / No -----	Who has your on-line password;	
How many trustees do you have			
Do you have policies for:			
Sending to and receiving funds from overseas	Yes / No	Investment (including ethical investment)	Yes / No
Handling cash or cheques	Yes/ No	Recruiting employees	Yes / No
Volunteers	Yes/ No	Benefits for trustees	Yes / No
Safeguarding	Yes / No	Expenses	Yes / No
Risk	Yes / No		

Money

Did you write or agree your TAR	Write	Agree	Both
Who plans your fund-raising?			
How often do you set a budget	Annually	More often	Less often
How often do you review the budget	Annually	More often	Less often

Land

Do you occupy land or buildings?	Yes	No	Don't know
Do you own them	Yes	No	Don't know
Do you rent them	Yes / no / DK	When does tenancy end	