

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.



While it is Small Charity Support's intention to provide you with the best possible support and information as we are able, it is important that you read and give due consideration to the notices at the end of this leaflet.





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^{XX}) appear in more than one page of the website, indicated by letters eg: TR = Trustees' Responsibilities.

Trustees' Annual Reports & Accounts

- ✓ Copies of all Small Charity Support's Trustees' Annual Reports & Accounts can be downloaded from the "About Us" page on the website. They can also be downloaded from the Charity Commission's Register of Charities



The Roles & Responsibilities of Small Charity Trustees {TR}

- ✓ 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)
- ✓ "Accounts" ALL Charities **MUST** keep {CA}
{A brief overview of what is required by the Charities Act}
- ✓ Minutes 📖 {Recording discussions & decisions effectively}
- ✓ Preparing the Trustees Annual Report & Accounts {including some useful templates}
- ✓ Choosing an Independent Examiner
{Not all professional/qualified accountants have the require knowledge of charity accounting practices.}
- ✓ Outputs & Outcomes {PP}
Demonstrating what the charity does and what it achieves and how it delivers "value for money".
- ✓ Programme Planning {PP}
Putting together a practical plan to run the charity Efficiently, Effectively & Economically



Small Charity Accounts Made Easy {CA}

- ✓ "Accounts" ALL Charities **MUST** keep
{A brief overview of what is required by the Charities Act}
- ✓ Typical Roles & Responsibilities of the Treasurer {TR}
{Including preparing regular reports to Trustees}
- ✓ Recording & Managing Your Charity's Funds
- ✓ Budgets & Cash Flows
- ✓ Financial Controls CheckList
- ✓ A Bank Account
- ✓ Preparing the Trustees Annual Report & Accounts
{including some useful templates}
- ✓ Accounting Issues Facing Small Charities
{Slides, with speaker notes, from a webinar given by Small Charity Support at the invitation of the ACIE, 22 June 2021}
- ✓ Preparing the Trustees Annual Report & Accounts
{including some useful templates}



Note: 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.

An Accounts Spreadsheet for Small Charities {CAS}

A MS-Excel spreadsheet demonstrating how the finances of a small charity can be managed and its Annual Financial Report prepared in accordance with Charity Commission requirements WITHOUT having to use complicated bookkeeping procedures and professional accountants or financial advisors. {*LibreOffice Calc compatible*}.

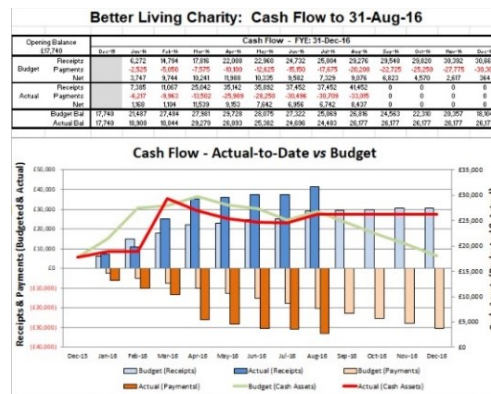
There are two versions of the spreadsheet:

- ✓ An **EXAMPLE** spreadsheet using real data {appropriately anonymised} from charities using the spreadsheet. This example illustrates how the spreadsheet functions in practice

- ✓ A **BLANK** spreadsheet from which a user can build up their own accounts format.

And there are four leaflets giving detailed guidance on how to set up and use the spreadsheet.

- ✓ **Introduction:** An overview of what the spreadsheet does;
- ✓ **Setting Up:** How to configure the blank worksheet to meet the needs of your charity;
- ✓ **Data Entry & Analysis:** How to enter transactions data into the spreadsheet, amend the data when necessary, and produce both in-built standard financial monitoring & management reports (eg: Budget & Cash-Flow) and how to use facilities like Sorting & Filtering to produce your own ad hoc reports;
- ✓ **End-of-Year Operations:** How to re-set the spreadsheet for use in the next financial period.



Example Policies & Procedures for Small Charities

18 downloadable example policies & procedures in both PDF and editable DOC formats which you can adapt to your charity's own requirements.



Bullying & Harassment

Code of Behaviour

Conflicts of Interest

Equal Opportunities

Financial Management

- Reimbursing Expenses & Purchases
- Reserves Policy (including a policy for managing large legacies).

Safeguarding Children & Young People

Safeguarding Vulnerable Adults

Safe Recruitment

GDPR

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

Supervision

Volunteering

{A link to the WCVA model policy}

Whistle-Blowing

On Becoming a Charity Trustee

For more information on the example policies and how they can be used, see the "[Example Policies](#)" page on the Small Charity Support website.

Starting & Registering a Small Charity {SC}

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 {PP};
- ✓ Charitable Purposes/Objects;
- ✓ Example Charitable Purposes;
- ✓ Governing Document
- ✓ Roles & Responsibilities of Trustees {TR};
- ✓ Bank Account {FM};
- ✓ "Simple is Beautiful" - Managing Charity Accounts {FM};
- ✓ Programme Planning {PP};
- ✓ Policies & Procedures {EP};



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

Round	A	B	C	D	E	F	G	H	I
1: General Knowledge	5	6	8	8	7	5	5	7	8
2: Music	7	3	8	3	7	4	7	8	5
3: Television	6	7	7	5	9	7	8	4	7
4: Around the World									
5: Mix and Match									
6: Sport									
7: Films									
8: General Knowledge									
Total Score	18	18	29	16	23	21	20	27	25



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