

## Compliant or Complacent?

The Trust Partnership has developed its Governance Review to help Trustees and key staff improve the effectiveness of their governance and to ensure that they are compliant with current regulations in all aspects of their organisation's activities.

It is the duty of all Trustees to run their organisation in the most effective manner possible – to fulfil their responsibility, not only to the charity - to ensure that its funds are used properly, fairly and economically, but also to themselves - to protect them from allegations of poor management or impropriety and to imbue them with the confidence that they are doing all they can to further the charity's objects.

The Trust Partnership's Governance Review team is headed by Tesse Akpeki, who was Head of the Trustee and Governance Team at the National Council for Voluntary Organisations (NCVO) for eight years.

The review includes:

- i. Initial telephone / face to face review to establish context, time frames and requirements.
- ii. A documentation and activity check list for you to complete.
- iii. Detailed on-site review of documentation, activities and procedures.
- iv. Report to Trustees for comment.
- v. On-site presentation of report and workshop with Trustees.

The report covers the following areas:

**The Legal Framework:** are your documents in order, relevant and up to date; do you operate in accordance with the requirements of your own governing documents?

**The Board:** do the Trustees have the required skill, experience and knowledge; are their roles and the structure in which they operate established and reviewed; and are they aware of their full responsibilities and liabilities?

**Organisation, Staff and Advisers:** are the responsibilities, the structure, reporting and appraisal methods clear, effective and relevant? Are the inherent risks assessed and addressed?

**Policies and Procedures:** are these recorded, operating and reviewed and do they meet the requirements of current legislation?

**Grantmaking:** is your programme monitored, controlled and secure?

**Finance:** is the control over your finances documented and can you demonstrate that all reasonable steps have been taken to ensure that the systems you employ are secure?

**Strategy:** do you have an effective strategy for what you hope to achieve, how, and by when?

The Governance Review package varies in cost depending on the size and scope of your organisation. Please contact **Benjamin Janes** to discuss your requirements on **01285 841 902** or at **Ben@TheTrustPartnership.com**.



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