

Stewardship: Charity Conversion (Model Governing Documents) Questionnaire

Please complete all relevant sections. This form may seem long, but completing it fully will assist smooth progress. Incomplete forms may be sent back. If there is insufficient space use the continuation section or attach extra sheet(s)

NAME, ADMINISTRATION & LOCATION OF CHURCH OR ORGANISATION

Name: You will have an existing name. You may take this opportunity to change the name. If so, check first with the Charity Commission (0870 333 0123) and ask for the *Central Register* in case your preferred name is already used. They will refuse to register if your name is the same as or too similar to an existing charity.

1 Full name of existing charity:

Any intended new name:

2 Any working name you use or wish to use:

3 Details of the main (official) correspondent including, where relevant, office address (if no office give home address):

Name Mr/Mrs/Miss/___ Capacity (*eg trustee*).....

Address.....

..... Postcode:.....

Daytime tel (.....) Alternative tel (.....) Fax:(.....).....

Email Charity website

Is the above an office or home address? Office Home

4 Date started (this may be approximate) _____ For churches, approx. no. of members _____

5 Location or locations where based or where main activities carried out (include relevant District/London Borough). If a church you should include the location where your Sunday meeting(s) is held (*the Commission tend to ask for this*):

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6 If you will be working overseas give details of the countries where you are or will be operating:

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DETAILS OF TRUSTEES

7 The trustees are the people having the legal powers and responsibilities to run the affairs, notably the financial affairs, of the charity. Their selection is therefore very important. For a church, it is sensible for the church leaders to be the trustees wherever possible. As you have an existing church charity, you need here to list the current trustees, and to include any new trustees you wish to add in the course of the conversion. Some general points on trustees: ■ There must be at least 3 ■ Avoid family members in the majority. ■ The majority of the trustees of a UK charity must be normally resident in the UK (ie, they must spend at least six months of the year in the UK)

Full name Home Address

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Full name Home Address

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Full name Home Address

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Full name Home Address

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Full name Home Address

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If there was insufficient space to show all the trustees, use the continuation section on last page and tick box

8 Trustee remuneration or other benefits

One of the key features of the new model documents is the provision that is made for trustee remuneration. This allows for paid spiritual leaders to be trustees provided they are not in a majority.

A note on spouses: payment of a spouse of a trustees is classed as a benefit to the trustee. So in calculating the number of paid trustees, you have to include those with a spouse who is paid by the church.

Please list here the names of the trustees who are or will be remunerated by the church:

Name:	The nature and amount of the pay/benefits:
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9 Apart from your answer to 8, will any of the following benefit in any way, directly or indirectly from the organisation: (i) trustees; (ii) others involved in managing the organisation; (iii) a relative or business associate of (i) or (ii)? If so, give details, and include any use or occupation of property as a home or for business purposes:

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Note on next sections: this is standard information that is needed to present to the Charity Commission. If you need a completely new charity this will all be relevant. If it is sufficient simply to amend your existing governing document, not all will be relevant, but it is simplest to obtain it all at this point.

INCOME, ASSETS & FINANCIAL ARRANGEMENTS

10 Financial Year

Every charity needs to work to a financial year and the Trustees can decide for themselves when this should run to. Common year ends are the 31st December, 31st March, 30th June, but it is entirely up to you which would suit you best.

What is, or will be, your financial year end? *Month* _____ *Date* _____ (*eg, December, 31st*)

11.1 Total income for last full year: _____

12 Are all or most of the assets of the charity (bank accounts, property, investments, etc.) held in England and Wales?

YES NO If NO, please give details

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13 Bank account details:

<i>Account name:</i>			
<i>Sort Code:</i>		<i>Account number:</i>	

EXISTING GOVERNING DOCUMENT

14 Please list/describe your existing governing document(s) (include any supplemental trust deeds):

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Please enclose copies of the above with this questionnaire. Please do not send originals at this stage. These may be asked for later.

15 Please also enclose a copy of the most recent appointment of trustees, eg deed, trustees' resolution or otherwise.

CHARITABLE PURPOSES & ACTIVITIES

16 Please set out your main purposes and activities indicating which are current and which are intended for the future. This information will help us to include the appropriate charitable purposes (known as "objects") and powers in the document we will prepare. Use continuation section if necessary and/or attach additional information.

We will include standard objects for a church: to advance the Christian faith and to relieve need, hardship and sickness. If you think any of your activities will be wider than these objects, give details below.

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GENERAL MATTERS

17 **Statement of Faith.** Many churches and Christian organisations wish to include a Statement of Faith in the Trust document and require Trustees to adhere to this. We often include the Evangelical Alliance Statement of Faith. Your own preferred statement could be used.

Do you wish to include a Statement of Faith? YES NO

If yes, will the EA Statement be acceptable? YES NO If NO: Preferred statement enclosed

18 **'Sexual orientation regulations'**. It is considered that the Sexual Orientation Regulations 2007 do not restrict a church's right to refuse to hire a hall to groups which are promoting sex outside of heterosexual marriage, e.g. a 'gay rights' group, so long as the church does not operate on a commercial basis and that it is clear and consistent in applying its doctrinal standards. Do you wish a statement to be included in your Statement of Faith to establish that your Church has a doctrinal stance on this point restricting use by groups which promote sex outside heterosexual marriage? YES NO

19 **Charitable Company required:** Tick box and answer the following:

Select option for tenure of office of trustees/directors:

- Indefinite (ie until resignation or removal) retiring and offering for reelection each year
 All retiring and offering for reelection every _____ year(s) - *specify frequency.*

Should the chairman have a casting vote? YES NO

Will you need provision for organisations to be members of the company? YES NO

Companies limited by guarantee have both **directors** (the trustees) and **members**. Normally the trustees are left to run the charity but have to report to members at the Annual General Meeting. We normally make the trustees/directors and the members the same people for simplicity. If you think you may prefer some other structure, please discuss with us.

20 Child Protection

20.1 Nearly all churches work with children and under 18s. Other charities may. If you do, the Charity Commission will require (i) that you have a suitable Child Protection Policy and (ii) that every trustee has a CRB (standard) disclosure certificate dated within 3 years from the date of application. If you need assistance, we recommend that you use the services of the Churches' Child Protection Advisory Service, who are specialists in this field.

Contact details: www.ccpas.co.uk; e: info@ccpas.co.uk; t: 08451 20 45 50.

20.2 If you already have a policy, please tick the box and send a copy with this questionnaire.

20.3 Do you make Criminal Records Bureau checks for:

Trustees YES NO **Employees** YES NO **Volunteers** YES NO

