

# The Ultimate Charity Start-up Checklist

## Define Your Charity's Purpose

- ☐ Clearly articulate your mission and the problem your charity aims to solve.
- ☐ Ensure your purpose meets the Charity Commission's definition of a charitable cause.
- ☐ Consider your beneficiaries and how your charity will make an impact.

## Choose a Legal Structure

- ☐ Decide on the most suitable structure:
  - Charitable Incorporated Organisation (CIO)
  - Charitable Trust
  - Unincorporated Association
  - Charitable Company (Limited by Guarantee)
- ☐ Research the benefits and obligations of each structure.

## Register Your Charity

- ☐ Choose a unique name that isn't already in use.
- ☐ Register with the Charity Commission (required if income exceeds £5,000 per year or if setting up a CIO).
- ☐ Choose a unique name that isn't already in use.
- ☐ Obtain a charity registration number.
- ☐ If applicable, register with Companies House (for charitable companies).

## Draft a Governing Document

- ☐ Write a constitution, trust deed, or articles of association.
- ☐ Ensure your document outlines:
  - The charity's purpose
  - Trustee responsibilities
  - Rules for governance and decision-making

## Appoint Trustees

- ☐ Select at least three unrelated trustees.
- ☐ Ensure trustees meet the eligibility requirements.
- ☐ Define roles and responsibilities within the board.

## Develop Key Policies

- ☐ Draft essential policies, including:
  - Safeguarding Policy (if working with children or vulnerable adults)
  - Data Protection Policy (GDPR compliance)
  - Conflict of Interest Policy
  - Financial Controls Policy

## Open a Charity Bank Account

- ☐ Choose a bank that offers charity accounts.
- ☐ Provide proof of registration, governing documents, and trustee details.

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## Fundraising & Grants

- ☐ Create a fundraising plan.
- ☐ Identify potential grant opportunities.
- ☐ Consider Gift Aid registration to maximise donations.

## Financial Management & Compliance

- ☐ Set up accounting systems to track income and expenses.
- ☐ Understand reporting obligations, including filing annual returns and accounts.
- ☐ Appoint a treasurer or financial officer.

## Marketing & Community Engagement

- ☐ Build a website and social media presence.
- ☐ Develop a strategy for engaging with supporters, beneficiaries, and stakeholders.
- ☐ Consider branding and storytelling to enhance your charity's visibility.

## Marketing & Community Engagement

- ☐ Conduct a final compliance check.
- ☐ Plan a launch event or awareness campaign.
- ☐ Continuously review and adapt as your charity grows.

By following this checklist, you'll be well on your way to establishing a successful charity that makes a real impact.

Need further support? RS Charity Solutions can help with charity registration, governance, and strategic planning. Contact us today!

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