

# Time For A Fresh Look at Your Charity’s Governance Foundations

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For many charities, governance documents only come out when something changes—or when something goes wrong. A recent change to the Charities Act 2005 gives registered charities a clear reason to dust them off. Charities must now complete a governance review at least once every three years. If a charity has been registered since at least 5 October 2023, its first review must be completed by 5 October 2026.

A governance review is not just a box-ticking exercise. It is an opportunity to check

whether the charity’s foundations still support the way it operates today. That review should include:

- the charity’s rules documents, such as its trust deed or constitution; and
- the charity’s key policies and procedures, including those relating to health and safety, privacy, financial management, conflicts of interest, staff and volunteers.

The real question is whether those arrangements still work in practice. When conducting the review, a charity should consider whether its governance procedures:

- are fit for purpose;
- support the charitable purpose; and
- help the charity comply with the requirements of the Charities Act 2005 and any other relevant legislation.

The Act does not prescribe exactly how the review must be carried out. Each charity can choose a process that suits its size, structure and circumstances. What matters is that the review is meaningful, the matters are discussed and decisions made are recorded. The charity must also confirm completion of its review when submitting its Annual Return or Update details form.

Charities Services has created a helpful governance review checklist, which is available online.

If your charity has not reviewed its trust deed or constitution recently, now is a good time to make that review a priority.