

Key Considerations for Charities and Not-for-Profit Organisations Facing a Dispute

Having the relevant information available at the outset can help your solicitor understand the dispute, assess your position and advise on the most appropriate next steps.

-  **Details of What Has Happened**
Prepare a clear summary of the circumstances that led to the dispute, including the key events and when they occurred, to help establish the background and identify the main areas of disagreement.
-  **Relevant Documents**
Gather relevant contracts, agreements, correspondence, meeting minutes and other records, as these may provide important evidence about the parties' respective rights, responsibilities and intentions.
-  **What Form The Collaboration Will Take**
The level of formality required will depend on the scale, complexity and risk involved.
-  **What Outcome You Want to Achieve**
Consider your priorities, as this will help shape the strategy for resolving the dispute.
-  **The Wider Impact**
Think about how the dispute is affecting finances, staff, beneficiaries, operations and reputation, as these factors may be relevant when deciding how quickly and firmly to pursue the matter.
-  **Important Deadlines**
Make your solicitor aware of any deadlines, court documents or time-sensitive correspondence immediately, as delays can affect the options available to your organisation.



Insurance Coverage

Check whether your organisation has legal expenses or other relevant insurance and provide details of any policy, as your insurer may need to be notified at an early stage.



If the Matter Is a Legacy Dispute

For disputes involving a charitable legacy, gather the Will, Grant of Probate where available, estate accounts and correspondence with executors, beneficiaries or other interested parties to help establish the nature and value of the charity's potential entitlement.



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