

Key Considerations for Trustees and Leadership Teams

Providing clear information about your organisation and the governance issue you are seeking to address will help your solicitor understand the position and provide focused advice.

-  **The Organisation's Legal Structure**
Be prepared to explain the organisation's legal form and provide copies of its governing documents.
-  **Your Current Governing Document**
Consider when the governing document was last reviewed and whether it accurately reflects how the organisation now operates.
-  **The Trustee Board**
Provide details of the current trustees and their duties.
-  **The Governance Challenge and Your Preferred Outcome**
Be prepared to concisely explain what has prompted you to seek advice.
-  **Decision-Making Arrangements**
Consider how decisions are currently made within the organisation and whether responsibilities are clearly allocated.
-  **Conflicts of Interest and Regulatory or Stakeholder Concerns**
Let your solicitor know about any correspondence or concerns raised by the Charity Commission, Companies House, funders, members or other stakeholders.



Chester Office
Knights Court
1 Weaver Street
Chester, Cheshire
CH1 2BQ
01244 354 800



Liverpool Office
3rd Floor
No. 4 St Paul's Square
Liverpool
L3 9SJ
0151 321 0000