Governance review checklist

Use this checklist to help your board or committee talk about how well your charity is governed. It can help you check what is working well, identify gaps, and agree on practical improvements.

You do not need to answer every question perfectly. The checklist is a discussion tool, not a compliance audit. Use it at a meeting, work through one section at a time, and record any actions you want to take.

Purpose and direction

☐ Can we clearly explain our charity's purpose?

☐ Do our current activities clearly link to that purpose?

☐ Have we discussed our priorities or direction in the past 12 months?

☐ Do we have a simple plan or goals for the next 1–3 years?

☐ Do we track progress against our priorities?

Roles and responsibilities

☐ Do all officers know what is expected of them?

☐ Can officers describe their legal duties in simple terms?

☐ Do we know who is responsible for key decisions?

☐ Do new officers receive an induction or basic guidance?

Board effectiveness and capability

☐ Do we have the right mix of skills, experience, and perspectives?

☐ Do we identify and address gaps in skills or knowledge?

☐ Does the chair run meetings effectively and make space for all voices to be heard?

☐ Do we manage disagreement or challenging behaviour appropriately?

Governing document

☐ Can we easily access our governing document?

☐ Do we follow it when making decisions, appointing officers, or changing how we work?

☐ Have we reviewed it in the past few years to check it remains fit for purpose?

Decision making

☐ Do we ask “is this in the best interests of the charity?” before making key decisions?

☐ Do we ask for more information when needed?

☐ Do we record key decisions, reasons, and follow-up actions in meeting minutes?

Conflicts of interest

☐ Do we declare conflicts of interest at the start of meetings?

☐ Do people feel comfortable declaring interests?

☐ Do we record these conflicts and how they are managed?

☐ Do conflicted members step out of discussions and decisions?

Financial oversight

☐ Do we review and approve a budget each year?

☐ Do we regularly review financial reports and question anything we do not understand?

☐ Do we have basic financial controls, such as two signatories?

☐ Can we explain how our funds support our charitable purpose?

Risk management

☐ Have we discussed “what could go wrong” for our charity?

☐ Do we know our top 3–5 risks?

☐ Do we have simple controls or plans to manage those risks?

☐ Do we revisit risks regularly (for example, once a year)?

Policies

☐ Do we have key policies (for example, conflicts of interest, financial delegations)?

☐ Do we review key policies periodically?

Transparency and accountability

☐ Are meeting minutes taken at every meeting?

☐ Are records stored securely and easy to find?

☐ Could we explain our decisions to a funder or regulator if asked?

☐ Do we communicate openly with members or stakeholders?

Legal and reporting obligations

☐ Do we know when our annual return to Charities Services is due?

☐ Do we file it on time?

☐ Are our details on the Charities Register correct?

☐ Do we check whether new laws or rules affect us?

Review and improvement

☐ Have we reviewed our governance in the last 3 years?

☐ Did we identify anything that needs improving?

☐ Have we followed up on past actions?

Next steps

After completing the checklist, agree on a small number of practical actions.

☐ Note any gaps, risks, or areas you are unsure about.

☐ Choose the highest-priority actions to focus on first.

☐ Record each action, owner, timeframe, and priority.

☐ Check progress at a future meeting.