



## Setting up a Community Group

This information sheet provides step-by-step guidance on how to establish a new community group or voluntary organisation. It outlines the key stages to ensure your group is effective, sustainable, and legally compliant.

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### Step 1 – Agreeing the Purpose of Your Group

- Begin by gathering a small number of people who share your interest.
  - Discuss what challenge or issue you want to address, who you want to work with, and what activities you plan to run.
  - Agree on your organisation's **aims** (what you want to achieve), **values** (the principles guiding your work), and **focus** (which communities or people you will serve).
  - Research existing organisations to avoid duplication and explore opportunities for collaboration.
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### Step 2 – Hold Your First Meeting

- Organise a public or open meeting to share your ideas.
  - Use this meeting to attract volunteers, raise your group's profile, and gather feedback.
  - Record minutes, attendees, and key decisions.
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### Step 3 – Decide on Your Management Committee

- A management committee (sometimes called trustees or a governing board) is legally responsible for the organisation.
  - Typical roles include Chairperson, Treasurer, and Secretary, alongside general committee members.
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### Step 4 – Decide Your Legal Structure

- Explore common legal structures:

#### Disclaimer

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- **Unincorporated models** (e.g. informal community groups, trusts)
- **Incorporated models** (e.g. Charitable Incorporated Organisations, Community Interest Companies, charitable companies)
- Your choice depends on how you want to run the organisation and the level of risk or responsibility involved.
- Guidance is available from regulators such as the Charity Commission and Companies House.

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### **Step 5 – Write Your Governing Document**

- A governing document sets out the rules for how your organisation will operate.
- Depending on your structure, this may be called a constitution, memorandum of association, or trust deed.
- Templates are available from regulators and voluntary sector support organisations.

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### **Step 6 – Write Policies**

Policies provide guidance on how your group should operate and are often required when applying for funding. Common policies include:

- Equality and diversity
- Safeguarding (if working with children or vulnerable adults)
- Volunteer policy
- Financial management policy
- Risk management policy
- Data protection

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### **Step 7 – Set Up a Group Bank Account**

- Open an account in the name of your group, not a personal account.

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- Most banks and building societies offer group accounts; specialist providers may also be available.
  - Typically, at least two unrelated signatories are required.
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### **Step 8 – Finding Volunteers**

- Identify skills gaps and recruit volunteers to fill them.
  - Volunteers can be found through word of mouth, community networks, or advertising roles online and locally.
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### **Step 9 – Make a Plan**

- Create a simple plan outlining what you want to do, why, and how.
  - Prioritise activities to avoid overstretching.
  - Assign responsibilities to individuals to track progress.
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### **Step 10 – Fundraising**

- Consider how you will fund your organisation and its activities.
- Explore grants, donations, and fundraising events.
- National voluntary sector organisations and funding directories provide useful advice.

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