What policies should CRED have in place?

Report by Steve Bridgeman, trustee, 19th October 2021.

I think we need 5 policies (highlighted below in red) and to consider 5 others (listed below but not highlighted).

Health & Safety – you must have this if you employ 5 or more people (1), so we don’t need one, but it may be a good idea (2).

Safeguarding – not required as we don’t directly deal with children or young people or vulnerable adults (1), but we would need to ensure that if we partner with other organisations and these categories are involved, we are satisfied that our partners have such a policy in place. We need in this case to define what we mean by ‘partner with’ – do we, for instance, check that the projects we ‘partner’ with have such a policy in place?

**Privacy policy including Data Protection & GDPR** – I suggest that we should have this (1) (2).

Equality & Diversity – since we only have one employee, I don’t think we need this, but it would be best practice to have a brief one (1). Equal opportunities could be considered in the context of future recruitment (2).

Risk management – I don’t think we need this, as we don’t organise trips or activities (1) (2). We should think about Helen’s trips, which we contribute to, and ensure that we are not being negligent. We should also consider trips we may be considered to have an interest in (University students). (4).

**Finance, including a financial procedures manual and a reserves (4) policy** – I think we need this (1). It may be necessary to incorporate a SORP (3). I don’t think we need an investment policy, as we don’t have enough surplus funds (4).

**Trustee code of conduct** – I think we should have this (1).

**Trustee conflict of interest** – I think we should have this (1) (4).

**Trustee expenses** – I think we should have this (1).

Scheme of delegation – interesting, but I don’t think we delegate outside the board of trustees sufficiently to warrant this (4).

1 [Policies and procedures — NCVO Knowhow](https://knowhow.ncvo.org.uk/organisation/operations/policies-and-procedures)

2 [Policies and Procedures Checklist – VolResource](https://vr.volresource.org.uk/org/policieschecklist/)

3 [Charities SORP (charitysorp.org)](https://www.charitysorp.org/)

4 [5 key policies that every charity should review annually (linkedin.com)](https://www.linkedin.com/pulse/5-key-policies-every-charity-should-review-annually-nick-sladden)