**Charitable Incorporated Organisation status – Transition helpline - 2021-22**

**Before you can access the SHARE funded helpline we need you to do some preliminary work**. (Helpline time is limited, so we need to make best use of it.)

**Please take an hour to work through our CIO Introduction** [**‘Should your museum become Incorporated? An Introduction’**](https://www.sharemuseumseast.org.uk/wp-content/uploads/2021/06/Should-your-museum-become-incorporated.pptx)

Once you have read through this summary and the related documents (on the links on the last page) please have a chat with your MDO about it and then **email the following to access the helpline:**

1. This completed questionnaire
2. A copy of your museum’s current governing documents
3. Any other relevant information

Send to **julie.cole@jmc-consultancy.co.uk****,** copying in**sally.ackroyd@norfolk.gov.uk**

**Please tell us:**

1. Museum Name: ………………………………………………………………………….
2. Charity no:………………
3. County and MDO name
4. Have you discussed your potential move to CIO with them?
5. Your Name**………………………………………………………………………………………**

Role at the museum**…………………………………………………………………………**

Contact details**…………………………………………………………………………………..**

1. Why are the trustees considering converting to a CIO? Tick all that apply

|  |  |
| --- | --- |
|  | Reduce financial liability for trustees |
|  | Enable legal agreements (e.g. lease, licence) to be in the name of the charity |
|  | Change the name of the charity |
|  | Purchase a building |
|  | Register museum buildings with the Land Registry |
|  | Attract new trustees |
|  | Enable non-members to become co-opted trustees |
|  | Employ or want to employ a member of staff |
|  | Remove the need for custodian trustees |
|  | Bank account(s) with building society  |
|  | Replace mandatory audits with independent examinations |
|  | Benefit from Gift-Aid |
|  | Excluding the above, what other concerns do the Trustees have with their current constitution /governing document |

1. How does your museum currently operate?

|  |  |
| --- | --- |
|  |  |

* + Select Venn Diagram A or B below which best illustrates the current situation.
	+ Update the relevant diagram to reflect reality if needed (you can re-draw this and email a scanned copy or photograph or failing that you can describe the differences in words).

**Thank you.**