

# Guidance notes for WIs applying to register with the Charity Commission

## Introduction

This note outlines the main steps and provides specific guidance for WIs on completing the application form.

You should also read the Charity Commission's guidance '**How to register a charity**' (**CC21b**), which includes detailed instructions. This is available at <https://www.gov.uk/guidance/how-to-register-your-charity-cc21b>.

## When to register

A WI must register with the Charity Commission when its gross annual income reaches £5,000.

However, it is not necessary to register if income exceeds £5,000 for just one year, for example because of a one-off grant, and will return below £5,000 in subsequent years.

Total gross income is defined as 'the total receipts recorded in the financial statement from all sources, excluding the receipt of any endowment, loans and proceeds from the sale of investments or fixed assets'. In practice, WIs are unlikely to have receipts from endowments, loans or sale of investments or fixed assets, so total income will be the total recorded in the financial statement.

## Before making the application

The WI Committee should nominate one or more committee members to complete the application on its behalf. The application must be made by completing an online form and attaching some required documents which have to be scanned / saved as PDF files.

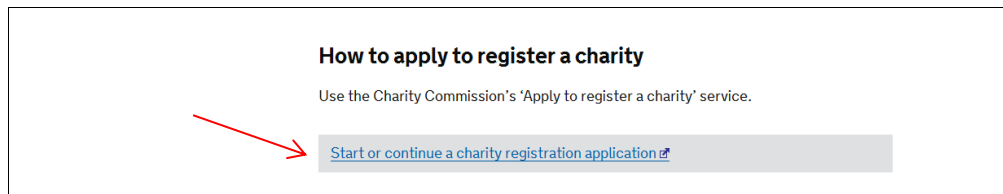
You will need to provide the following:

- Details of your WI's main bank account
- Public contact details for your WI, including a postal address – this will normally be the secretary's name and address.
- A copy of your WI's signed constitution, scanned and saved as a PDF file. Note that this should be the current version of the WI constitution as revised in 2013.
- Proof that your WI's income is over £5,000. Normally this will be your WI's latest financial statement scanned and/or saved as a PDF file.
- A completed Trustee Declaration Form, signed by all the WI trustees, scanned and saved as a PDF file. (The committee members are the trustees of the WI). To get the form, follow the link in CC21b or go directly to: [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/490837/trustee\\_declaration\\_v\\_8.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/490837/trustee_declaration_v_8.pdf)
- You will also need to enter each trustee's full name, address and post code, any previous names, date of birth and contact details, including email address if they have one. Only the trustees' names are displayed on the public register of charities.

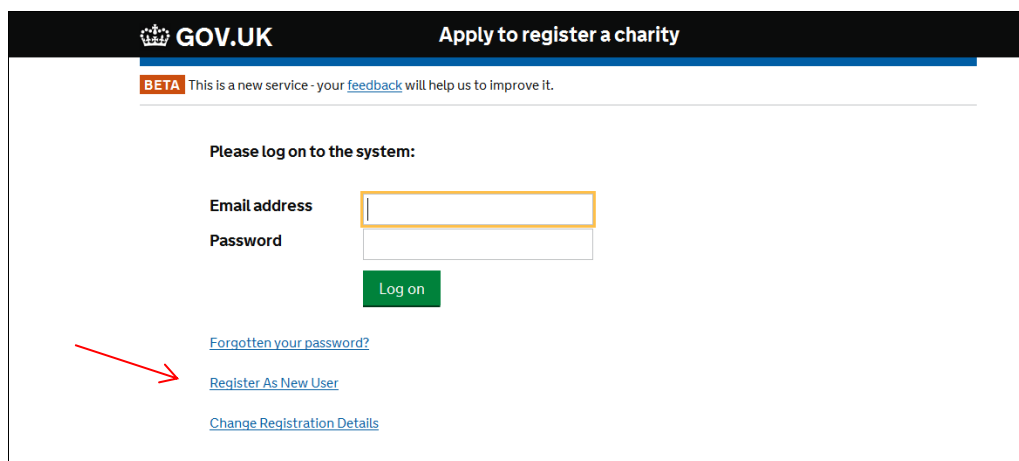
Note: This guidance is based on the Charity Commission's guidance and the ' <i>Apply to register a charity</i> ' service at the date of writing.
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## Getting started

Go to CC21b on the Charity Commission website at the link given above. Scroll down the page and click on 'Start or continue a charity registration application', to take you to the 'Apply to register a charity' service, as shown here:

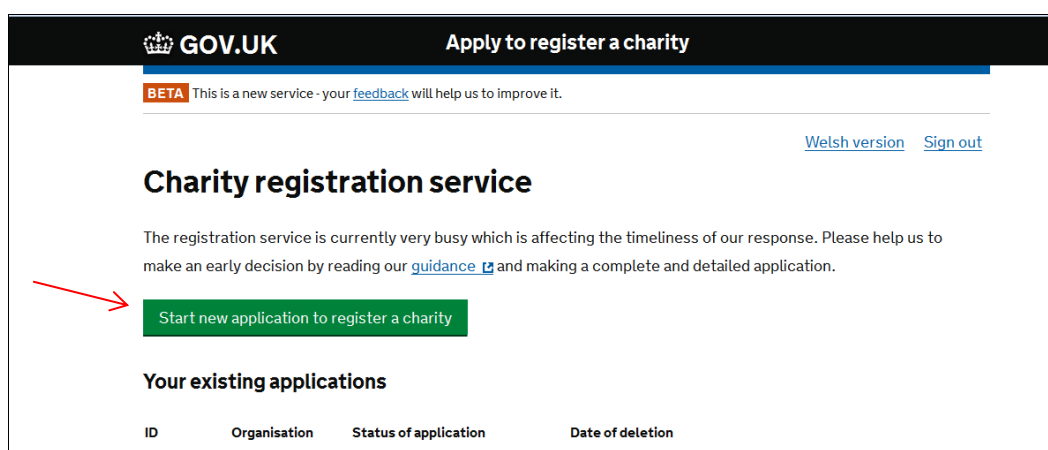


The first step is to register as a new user. On the next screen, click on 'Register as New User':



You then have to enter your email address and the Charity Commission will send you an email containing a password. Once you receive this you can log in to the system using your email address and password. Remember to keep a note of the email address and password.

After logging in, click on 'Start new application to register a charity':



Once started, your application will be given a reference number. You can save the part-completed application at any stage and return to it later from this screen using the reference number, for up to three months.

You can also print a part-completed application at any time by clicking on [Print a copy](#) at the top of any page.

## Completing and submitting the application

You should complete the application with reference to the WI Constitution.

The following section provides assistance with options or questions that generally apply to all WIs. You should answer any other questions and add further information based on your WI's individual circumstances.

Before submitting the completed application, you will have to tick the declaration below. Before doing this you can print or email a copy of the form for review by the other Committee Members.

- ☐ I certify that:
- all information provided has been checked by the trustees and is correct and complete to the best of my knowledge
  - all trustees agree to this submission and have read and accept the commission's privacy terms

CC21b includes a section explaining what happens after you submit the application.

## After your WI is registered

You must keep your WI's registered details up to date with the Charity Commission, including all contact and trustee details. You will have to confirm and if necessary update them at least once a year. If your WI's income exceeds £10,000 then you will also have to complete an annual return.

Any changes in the contact details for your WI should be updated as soon as possible so that your WI receives all important correspondence from the Charity Commission.

All updates and returns are made through the Online Services. You will need your charity registration number and online service password to access this. It is therefore important to make sure that a secure record is kept of the password.

## The application form

### Governing document

The WI's governing document type is 'Constitution'.

Answer 'Yes' to the question 'Has the governing document been issued by an organisation or umbrella body and select 'WOMEN'S INSTITUTE – UNINCORPORATED INSTITUTE' from the list of options given.

Click  and attach the PDF file of your WI's signed constitution.

### Charity name

Enter the name of your own WI as recorded in its constitution.

*Answer 'No' to the other questions in this section.*

### Structure and purposes

Enter the date your WI's constitution was signed.

### Income

Your WI's gross annual income is the total income figure in your latest financial statement.

Click  and attach the PDF file of your WI's latest signed financial statement.

### Classifications

*The following classifications and sub-classifications correspond to the WI's constitution:*

#### What does the organisation do?

- ✓ Education/Training/Research
  - ✓ Advancing education
- ✓ Advancing health or the saving of lives
  - ✓ Health education or sickness prevention
- ✓ Environment/ Conservation
  - ✓ Conservation of flora, fauna or the environment generally
- ✓ Citizenship / Economic or community development / Employment
  - ✓ Civic responsibility / Good citizenship
  - ✓ Promotion of volunteering / Voluntary sector

#### How does the organisation operate?

- ✓ Provides education / advocacy / advice / information

#### Who does the organisation help?

- ✓ Other defined groups
  - Specify: Women and their local community
- ✓ People living in a specified geographical area

#### Where does the organisation operate?

*Select the relevant options for your WI*

## **Carrying out the purpose**

### **Explain how the organisation carries out its purposes:**

The WI holds at least eleven meetings a year, with educational speakers or activities.

*Add further information on other activities your own WI undertakes.*

## **Benefits**

### **What are the benefits of the organisation's purposes?**

Women have opportunities to gain knowledge and skills and to work together to change and improve conditions in their communities.

### **Who can benefit from the organisation's purposes?**

✓ A section of the public

### **Select one or more group that can benefit from the organisation's purposes**

✓ Other section of the public

### **Explain who can benefit and why the organisations' purposes aim to benefit them**

Women and girls and their local community can benefit in accordance with the ideals for which the Women's Institute stands

## **Carrying out the purpose for the public benefit**

### **What criteria do the trustees use to decide who the organisation benefits or what work it does or supports?**

The trustees take account of members' views, the overall purposes of the Women's Institute organisation and local and national mandates selected by members.

## **Grant making**

### **Is the organisation a grant maker**

✓ No (*Answer 'No' even if your WI gives a Denman bursary; you would only answer 'Yes' if making grants is one of your main activities.*)

## **Membership**

### **Do people or organisations have to be members of the organisation to benefit from its purposes?**

✓ No

## **Providing services or facilities**

### **Does the organisation provide public facilities or services**

✓ No

## **Fees and charges**

### **Does the organisation charge people to be a member or to access its services or facilities?**

✓ Yes

### **What services or facilities does the organisation charge for and how much does it charge?**

The WI charges a membership fee giving the right to attend meetings and participate in activities organised by the WI. The membership charge is set nationally by the trustees of the National Federation of Women's Institutes; current charge is £....

*Add any further information of other charges made by your own WI.*

**Do the trustees consider the charges to be more than the poor can afford?**

✓ No

**How have you reached this view?**

The annual charge is the equivalent of a few pounds each month.

### **Property**

**Does the organisation use premises owned by a trustee or someone related to a trustee?**

Give the relevant answer for your own WI.

### **Contact information**

*Enter details of the person making the application and contact details for your WI*

### **Other regulators**

**Are you registered with any of the following regulators?**

Leave blank: the WI is not regulated by any of the listed regulators

**Do you have a gift aid number from HMRC?**

Answer 'Yes' if your WI is registered for Gift Aid and enter your HMRC number.

### **Trustee numbers**

**How many trustees does the organisation currently have? (total)**

The number of Committee Members in your WI

**What is the minimum number of trustees the organisations' governing document says it must have?**

Three (*as specified in the WI constitution*)

### **Funding**

**Please explain how the organisation is or will be funded in the future**

✓ Charging for services: membership fees / charges for activities (if applicable)

*Select any further options relevant to your WI*

### **Tax**

**Does or will the organisation benefit from any of the following tax relief?**

✓ Gift Aid *if applicable to your WI, otherwise* ✓ None

*Answer 'No' to the other questions in this section.*

### **Connections**

Give the appropriate answers for your own WI

### **Managing Risks**

**Does the organisation work with children or vulnerable people?**

✓ No

### **Declaration**

See the note on page 3 under 'Completing and submitting the application'

**After you submit** in this section explains the next steps