

Entry Point	Organisational Stage	Next Stages (Journey)	Support Offered (Indicative list)	Appropriate Training/Event (in house)
- 1 ➡	Setting up a Charity or Voluntary Association (Idea Stage)	↓	<ul style="list-style-type: none"> Meeting a need and mapping existing provision Scoping exercises Ownership and Remuneration Vision/Aims/Missions Planning activities Choosing a legal form 	Encouraged to attend → Setting up a Charity**
- 2 ➡	Setting up a Charity or Voluntary Association (Registration and Forming)	↓	<ul style="list-style-type: none"> Charitable status/SCIO application Forming Governing Documents Appropriate policies and procedures Forming robust governance structures for Trustees and Management Committees <ul style="list-style-type: none"> - Codes of Conducts - Conflicts of Interests Good practice guidelines Understanding compliance and regulation Fundraising/Access Funds 	Encouraged to attend → Setting up a Charity** Introduction to SCIO** Roles and Responsibilities of Charity Trustees** EVOT/Trust Funder** Introduction to Charity Finance**
- 3 ➡	Third Sector Networks/ Partnerships/ Forums	↕	<ul style="list-style-type: none"> Peer support Consultations Linking into strategy and policy development Thematic partnerships Local Planning partnerships 	Encouraged to attend → ThinkSpace** Thematic Network Meetings**
- 4 ➡	Organisational Health Check	↕	<ul style="list-style-type: none"> Policies and procedures templates and reviews* Constitutional Review Quality Assurance* Working with Outcomes Evaluation and reporting Disclosures for staff/ PVG Equal opportunities Health and safety Human resources and post grading and job descriptions* Facilitation of Staff/Volunteer strategic away days 	Encouraged to attend → Roles and Responsibilities of Charity Trustees** Introduction to Charity Finance** Wider EVOC Learning Programme EVOT/Trust Funder**
- 5 ➡	Good Governance and Compliance	↕	<ul style="list-style-type: none"> Roles and Responsibilities Effective meetings Leadership skills* Trouble shooting with the board Organisational restructuring Change management* Conversion to SCIO or other Legal Form Winding up/Dissolving Skills Development* Independent Examiners* Facilitation of Trustee/Directors strategic away days* 	Encouraged to attend → Roles and Responsibilities of Charity Trustees** Introduction to SCIO** Introduction to Charity Finance** Wider EVOC Learning Programme

*indicates where a referral might be made for support from an external partner or agency

** indicates that training or event is free of charge