

## Scout Group Trustee Checklist

This checklist is provided as a guide to key responsibilities of Trustees in a Scout Group, with the purpose of reminding Group Trustees of a number of aspects within their roles and responsibilities. It does not pretend to be a comprehensive list of responsibilities, but hopefully is of assistance to ensure that the basics and essentials are covered.

There is no requirement to 'submit' a completed checklist beyond the Group.

If you wish for further assistance in any of the items listed below, please contact your District Lead Volunteer or District Chair in the first instance.

|                     |  |
|---------------------|--|
| Name of Scout Group |  |
|---------------------|--|

### Premises

| Status   | Yes/No |   |   |
|--|--------|---|---|
| Does the Group use property or land in its name? |        | What is the list of such property/land?   |   |
|  |        | For each item of property or land, answer the following:  |   |
| Freehold   |        | Do you know who is the owner? (Group, or Custodian Trustees, etc.?)   |   |
|  |        | If not the Group, do you know who the Custodian Trustees are? Is it The Scout Association Trust Corporation (SATC) instead? Do you know where the Deeds are held? |   |
| Leasehold  |        | Do you have a copy of the lease? (If not, you should obtain a copy)   |   |
|  |        | Do you know how long the lease is for? When will it expire? Has it expired? What are the likely renewal costs?  |   |
|  |        | Are there any onerous clauses (restrictions) (subletting/renting out restrictions, etc.?)   |   |
|  |        | Who are the lessees – Group or other Trustees?  |   |
|  |        | If not the Group or The Scout Association, are you happy with the situation? Should it be changed?  |   |
| Rented   |        | Do you have a copy of the rental agreement?   |   |
|  |        | What is the annual rent?  |   |
|  |        | Have you checked the rental agreement with Unity Insurance Services to ensure it contains no wording that might compromise your                                   | Contact details for Unity can be found via the link in the Insurance section. |

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|          |  | Public Liability Insurance? Ideally this should be done before signing it.   | This would also apply for one-off rentals e.g. meeting rooms. |
|          |  | Does your rental agreement have a review/renewal clause in it? If so, do you know when that is, and what that means? |   |
|          |  | Are there any onerous clauses (sub-letting/renting out restrictions, etc.)?  |   |
| Free use |  | Is there a formal agreement?   |   |
|          |  | Are there any onerous restrictions?  |   |

### Registered Charity status

|   | Yes/No |   |
|---|--------|---|
| Is your Group a Registered Charity?   |        | If no, check POR 5a.1.3.2 to ensure you don't have to register.   |
| If yes, are all details of your charity up to date (including with the up-to-date list of Trustees, and up to date 'activities' definition of our purpose) on the Charity Commission website, i.e. name of Group, activities, etc.? |        | If no, please update asap. Use The Scout Association (charity 306101) entry to obtain the text for your activities, governing document and charitable objectives. |

### Registered Charities only

|   | Yes/No |   |
|---|--------|---|
| Are your latest Trustee Annual Report and accounts, including the Independent Examiner's report submitted and logged on the Charity Commission website? |        | If no, please update as soon as possible. They must be submitted within 10 months of the end of the financial year. |

Charity Commission website at [www.gov.uk/government/organisations/charity-commission](http://www.gov.uk/government/organisations/charity-commission)

### Safety

|  | Yes/No |   |
|--|--------|---|
| Do you know who in your Group is responsible for safety in and around each property or land used by the Group?   |        |   |
| Is safety an agenda item at each of your Group Trustee Board meetings? Do you have processes in place to gain assurance on safety issues you need to cover, including, but not limited to, the questions listed in the rest of this section? |        |   |
| If you own your property or land (freehold or leasehold), have you carried out a risk assessment on your property? This might include a campsite, store etc.   |        |   |
| If you rent your property, have you had sight of the owner's risk assessment?  |        |   |
| Are you confident all the electrical equipment you use in the Group is safe? (Note: the County offers a free PAT service – see below.)   |        |   |
| Do you have a Fire Risk Assessment and a fire evacuation plan for your building?   |        | If you rent the building, you should ask the 'owner' for a copy of their Fire Risk Assessment and |

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|  |  | details of the arrangements to be followed in the event of a fire. Recognising that Trustees might not judge it necessary where another Group's HQ or an external venue is used on a one-off or very occasional basis for Trustee Board meetings or Group team meetings. External venues may in any case provide this information as part of their hire agreement. |
| Do you have asbestos in your building? Have you had an asbestos survey carried out?  |  | See link below for guidance on managing asbestos.  |
| If you have a building with accommodation and showers, you should have some controls to reduce your user's exposure to the risk of Legionella. |  | See link below for guidance on Legionella.   |
| If there are trees at your premises have you assessed the risk of damage or injury being caused by falling trees or branches.                  |  | See link below for tree safety guidelines.   |
| Is any gas or other hazardous equipment or materials stored in accordance with safety regulations and your insurance requirements?             |  |  |

For further advice on risk assessments please contact [countyadmin@berkshirescouts.org.uk](mailto:countyadmin@berkshirescouts.org.uk) who will get a member of the County Safety Team to contact you

For a free PAT service please also contact [countyadmin@berkshirescouts.org.uk](mailto:countyadmin@berkshirescouts.org.uk)

Further advice on safety at - [Safety – Berkshire Scouts](#), and [www.scouts.org.uk/volunteers/staying-safe-and-safeguarding/safety/managing-a-safe-scoutpremises/](http://www.scouts.org.uk/volunteers/staying-safe-and-safeguarding/safety/managing-a-safe-scoutpremises/)

Further advice on asbestos, Legionella and tree safety [Maintenance and compliance | Scouts](#)

## Trustees

|   | Yes/No |   |
|---|--------|---|
| Do you know who all your Trustees are?  |        |   |
| Are all your Group Trustee Board members recorded on the membership system, and have any 'retired' Trustees had their roles closed? |        |   |
| Do all your Trustees have a current valid DBS disclosure?   |        | This can be checked on the membership system. It is a legal requirement.  |
| Do all your Trustees know their responsibilities as a Trustee?  |        | See POR Rule 5b.2.1.5 and 5c.1.6  |
| Have all your Trustees completed the Trustee Declaration on the membership system.  |        | See POR Rule 16.1.3.1(d)  |
| Have the Trustee eligibility checks been completed satisfactorily for all Trustees?   |        | See POR Rule 16.1.3.1(e)<br><a href="https://www.scouts.org.uk/volunteers/running-things-locally/trustee-boards/recruiting-new-trustees/trustee-eligibility-checks/">https://www.scouts.org.uk/volunteers/running-things-locally/trustee-boards/recruiting-new-trustees/trustee-eligibility-checks/</a> |

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|---|--|--|
| Have all Trustees completed the mandatory online training? This includes, Safety, Safeguarding, Data Protection, 'Who we are and what we do', Creating Inclusion and Being a Trustee in Scouts. A simple 'induction' by the Chair for new members is also useful. |  | See <a href="#">Learning   Scouts</a><br><br>Safety and Safeguarding training modules must be completed within 30 days of appointment and updated every three years. |
| Do you have at least two Trustees aged between 18 and 25 on your Group Trustee Board?   |  | This is good practice.   |

## Risk Management

|   | Yes/No |                                  |
|---|--------|----------------------------------|
| Do you maintain a Risk Register? Is it reviewed on a regular basis including putting in place appropriate mitigations? Where appropriate do you place a financial value against your risks? |        | POR requirement – Rule 5c.1.6.4a |

For further information regarding Risk Registers and identifying and managing risk go to: [Risk Register | Scouts](#) There are a variety of Risk Register templates that can be used, the template used by County Trustee Board can be obtained from the County Chair

## Insurance

|   | Yes/No |  |
|---|--------|--|
| Is your property fully insured (where owned or leased)? Is it adequately insured for rebuilding costs?  |        |  |
| Is your equipment insured? (When was it last valued?). Is it insured when lent or rented out – i.e. when used by anyone other than members of the Scout Group?  |        | For Groups that insure through Unity see: <a href="https://www.unityinsuranceservices.co.uk/scout-insurance/property-equipment-insurance">https://www.unityinsuranceservices.co.uk/scout-insurance/property-equipment-insurance</a>  |
| Do you have an equipment/asset register? Does it estimate replacement costs so that you can be sure to have adequate equipment insurance?   |        |  |
| Unity Scout Insurance has a number of supplementary personal injury plans for leaders, and additional cover for non-members? Have you considered these?   |        | Note that there are limits on all insurance policies, and there is no automatic cover for non-members. See details of cover available from Unity:<br><br><a href="https://www.unityinsuranceservices.co.uk/scout-insurance/accident-medical-insurance">https://www.unityinsuranceservices.co.uk/scout-insurance/accident-medical-insurance</a> |
| When did you last review your insurance cover for all aspects of your property (buildings and land), equipment, vehicles and personal injury insurance?   |        |  |
| If your Group, or a section within it, is running an event or expedition (particularly abroad), are there any specific exclusions that may cause a financial issue, e.g. exclusions for pandemics, etc. |        | If so, is everyone clear who is liable for the costs – Group, parents etc?   |

For more information on insurances go to [Scouting & Scout Groups Insurance | Unity Insurance Services](#) It is recommended that you review the current status of your insurances and the options available to you.

The Scout Association provides additional insurance to cover any children of leaders and helpers for accidents etc., where these children are not members. It also provides Public Liability Insurance and Trustee Indemnity Insurance. Details of these can be found at [Unity Insurance Services](#).

## Finance

|   | Yes/No |   |
|---|--------|---|
| Is your Group registered for Gift Aid?  |        | For a small amount of admin work, the Group can get an additional income of 25% of all membership subscriptions.<br><br>You can obtain advice regarding Gift Aid through your District Treasurer. There is also information at <a href="#">Gift Aid   Scouts</a>  |
| Have you got at least 2 signatories on your bank account(s) with 2 signatories required on cheques and electronic transfers?  |        | If not, this must be changed in accordance with POR requirements - Rule 5e.5.1.4  |
| Do you know what bank accounts the Group has?   |        |   |
| Do you have any Group bank debit, credit or payment cards? If so, are their limits reviewed? What procedures do you have in place for controlling their use? Do you have a card use policy?                         |        | Consider 'pre-loaded cards' or 'expense cards' as these might work for camps or events.<br>POR 5e.5.1.9 from Autumn 2025 edition  |
| Does the Group have a clear expenses policy in place, a clear method of claiming expenses, and a culture that actively encourages leaders and other adults to claim their expenses?                                 |        | All leaders and other adults working with the Group in any capacity should not be out of pocket for their work with the Group - they give their time generously for the work of the Scout Group and this should not be a cost to them.  |
| Are you aware that the Group Trustees must approve the Group Trustees' Annual Report and Accounts after examination by an auditor or independent examiner, at a meeting prior to the Group AGM. (POR Rule 5b.3.2.2) |        | The Group Scout Council (the Group AGM) only 'receives and considers' the accounts – it does not vote on them as this is for the Trustees (POR 5c.1.5.3b). The Group Trustees' Annual Report and Accounts is a report from the Trustees to the Group Scout Council.<br><br>Note: From the 2026/27 financial year examination of accounts will need to be undertaken by an independent examiner or an auditor, depending on the level of gross income in the year in question. |
| Were your Group accounts submitted to the District Treasurer within 14 days of your Group AGM?  |        | POR requirement – Rule 5e.2.1.2   |

Note: a maximum of £120,000 is covered under FSCS rules, so if you have more funds than this, you may wish to use more than one bank account (not in the same banking group).

## Data Protection - GDPR (The General Data Protection Regulation 2016)

|  | Yes/No |   |
|--|--------|---|
| Has your Group worked through The Scout Association's GDPR Toolkit?  |        | If no, you need to work through it.   |
| Does your Group have a 'Data Protection Policy' and a 'Data Retention Policy'? Do your Group team members/leaders know their responsibilities in this? Is the Group Data Protection Policy publicly visible e.g. on the Group website? |        | <p>If no, you need to work through the Scout Association's Data Protection Toolkit to ensure you comply. The Data Protection template is in step 10 of the Toolkit, and the Data Retention template is in step 11.</p> <p>The updated Data Protection policy is at 2a.4 in the Autumn 2025 POR. It includes responsibilities of the Group Trustee Board (2a.4.2.1) and the Group Leadership Team (2a.4.2.2). These are also covered in the Group Leadership Team responsibilities (4.4.2.3) and the Group Trustee Board (5b.2.1.4).</p> |

Link to The Scouts Data Protection and Records Management information:

[www.scouts.org.uk/volunteers/running-things-locally/data-protection-and-record-management](http://www.scouts.org.uk/volunteers/running-things-locally/data-protection-and-record-management)

## Website and Social Media

|   | Yes/No |   |
|---|--------|---|
| Do you have a website?  |        |   |
| Is it up to date?   |        |   |
| If not, do you have a plan to update it?  |        |   |
| Do you know who hosts your website?   |        |   |
| Do you know who has overall responsibility for your website?  |        | You ought to have more than one person with access. |
| Do you have a Group Facebook group/page, Twitter, and other social media?                           |        |   |
| Do you have an active policy for the use and membership of Facebook by/for the Group?               |        |   |
| Do you have a policy about obtaining permission from parents to publish pictures of their children? |        |   |

Berkshire Scouts can host your website and has developed a number of 'standard' templates. For further information, contact [Berkshire Scouts IT Help Desk - Jira Service Management](#)

## Vehicles

|   | Yes/No |  |
|---|--------|--|
| Does the Group own any vehicles or trailers?            |        |  |
| Are they fully insured?                                 |        |  |
| Who is responsible for the maintenance of the vehicles? |        |  |

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| Are drivers fully qualified to drive these vehicles, especially in the case of minibuses? Who controls who can drive the vehicles? |  |  |
|--|--|--|

**Motion Picture Licence**

|  |        |  |
|--|--------|--|
|  | Yes/No |  |
| Does your Group ever show DVDs, videos, etc.?              |        |  |
| If so, you need a Motion Picture Licence. Do you have one? |        |  |

Districts can cover all Groups in a much cheaper way – contact your District Lead Volunteer or District Chair for more information, or to check whether the District has taken this out. The Scouts info link is: [www.scouts.org.uk/volunteers/running-your-section/administration/motion-picture-licensing](http://www.scouts.org.uk/volunteers/running-your-section/administration/motion-picture-licensing)

**Other useful information for Group Trustee Boards**

This link to The Scout Association’s website provides a considerable amount of useful information for those on Group Trustee Boards, including guides for the Group Chair, Group Treasurer, Trustee Board members, supporting young people, as well as other useful advice.

[Trustee Boards | Scouts](#)