Congratulations, you are the officer of a registered charity

As an officer your biggest responsibility is to act in the best interest of your charity, making sure it remains focused on its purpose and the benefit it provides to the public.

This resource is a starting point to help you understand your role as an officer and how you can contribute to governing your charity well.

1. Understand your rules and your role

To be an effective officer, you need to understand your charity's legal structure and how you fit in.

Your rules - usually a constitution or trust deed - describe the purpose of your charity and how your charity can achieve its purpose. You can read your rules on the Charities Register.

2. Know your legal obligations

Charities have different obligations depending on their structure, their rules, the services they offer and their funding. They may also have different tax responsibilities.

A charity can carry out any legal activity to advance their purpose, but it's important to know about political activity and advocacy.

For more on your legal duties, check out Charities Services' legal obligations page, the Community Law's Community Toolkit and A Legal Handbook for Charities.

3. Manage risks carefully

It is your duty to make sure your charity has adequate policies and procedures in place to manage risks. Check if you have a conflict of interest policy for your charity, and policies for when a dispute happens.

CommunityNet Aotearoa has useful policies and procedures and risk management resources.

4. Look after your finances

It is your duty to know that your charity's money is being used to advance your charitable purpose. This means ensuring financial controls are in place.

Check out CommunityNet Aotearoa's Introduction to financial management.

5. Keep good records

Good record keeping is important. You should keep accurate records of your charity's meetings, what your charity earns, what you spend, what you do and your volunteers.

Check out CommunityNet Aotearoa's Introduction to record keeping.

6. Be strategic and sustainable

One of the greatest challenges for any charity is planning for the future and achieving sustainable funding.

Use NZ Navigator to monitor your charity's governance and identify your strengths and weaknesses.

Future proof your charity by planning for succession on your governing group and making an induction plan.

7. Report annually

Registered charities must file an annual return and a financial statement or a performance report six months after their balance date.

Financial statements and performance reports must meet the reporting standards designed for charities.

8. Update details

It is essential to keep your contact details up to date so we can stay in touch and send you reminders of when you need to file.

You need to update us within three months when there is a change to your charity's details on the charities register.

9. Keep learning

For most charities, it is worth taking time to understand your duties and to learn about how to improve your charity.

CommunityNet Aotearoa's Introduction to governance is a great start.

Keep in touch with us to get regular updates about governance resources, training and legal updates. Sign up to our newsletter.

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