



Case study

We carried out a review for the **Jewish Museum** which has an income of around £2m per year. The trustees wanted a 'health check' to make sure their governance arrangements were up to date, compliant and good practice. We helped them with:

- ✓ **Modernised articles of association**
incorporating good practice recommendations from the Charity Governance Code and the Accreditation Scheme for Museums.
 - ✓ **Policies and procedures**
looking at their operations we highlighted the essential policies and the optional ones to consider for good practice.
 - ✓ **Trustees**
we reviewed, updated and redrafted their code of conduct, conflicts of interest policy, role descriptions and scheme of delegation.
 - ✓ **Members**
we advised on the role of members, their rights and responsibilities, and gave guidance on meetings and resolutions.
 - ✓ The **trading subsidiary** had been set up a while ago, so we carried out a health check against the Charity Commission's requirements, including new articles of association, a fresh framework agreement with the charity and gave tax and trading advice.
 - ✓ **Risk management policy and register**
once we understood the operations, we worked with the team to look at risk management, including a new policy and register.
- We consolidated this into a governance handbook for the organisation and a board pack for the trustees which will help with induction for new trustees. We then trained the board on the new arrangements to embed good governance.



Bates Wells was an excellent partner in our governance review. Their support was highly professional, focused and pragmatic. Lawrie Simanowitz got immediately to the heart of the issues and offered sound counsel throughout; Hannah Lyons is extremely competent and responsive. Together, they ensured the work was well-targeted, thoughtful, and provided a strong platform for the future. We very much enjoyed working with them. I wouldn't hesitate to recommend them.
Nick Viner, Chair of Trustees
The Jewish Museum