



INSPIRING
FINANCIAL
LEADERSHIP

TERMS OF REFERENCE

CFG Banking Forum

Role of the Group

- To provide a structured forum for discussion between the charity banking industry and CFG member charities around areas of mutual interest.
- To assist communication and collaborative work in providing banking services for charities.
- To identify the needs of charities with regards to banking services and related policy issues.
- To feed into the direction and content of policy work carried out by CFG in areas impacted by charity banking.
- To develop joint projects between different stakeholders.

Structure

- The Banking Forum will consist of CFG subscribers from the banking industry, representatives from CFG member charities that have registered an interest and the Small Charities Coalition.
- CFG may at times contact members or external parties that they feel may have expertise or an interest in a particular topic, to ask them if they would like to attend, or speak at, a forum meeting.
- The group will meet 4-5 times per year on pre-determined dates.
- CFG will act as secretariat, co-ordinating and chairing meetings and distributing the agenda.
- Topics will be agreed in advance. To propose a new topic, Banking Forum members should contact the CFG policy team.

Operation

In order to maximise the effectiveness and scope of the Banking Forum, CFG will:

- Produce minutes for each Banking Forum meeting and make them available to all CFG members on the CFG website.
- Report on key discussions or findings from the Banking Forum in the CFG monthly member's newsletter following a meeting.
- Work with transparency within the Banking Forum to ensure that all organisations that are part of the forum are aware of the emerging work streams.
- Feed key issues, information and recommendations produced by the forum back into ongoing policy work.

Attendees from the banking industry will:

- Be open and transparent about any work they are doing which has emerged out of the Banking Forum itself.
- Work collaboratively with other members of the forum in order to enhance their understanding of the issues faced by charities in accessing banking services.
- Endeavour to at all times improve communication and respond to queries regarding banking services for charities openly and coherently.

Attendees representing charities will:

- Work collaboratively and co-operatively with banks on topics of mutual interest, communicating effectively their concerns that are related to banking services.
- Focus discussion on the pre-defined topic area and come to the CFG policy team with new potential areas for discussion or arising issues in advance.

Values

We will work together in the spirit of professional co-operation and support.

We will seek to work openly and transparently, and wherever possible in resulting joint work, be inclusive of others in the forum and wider CFG membership.

We will ensure that communication is effective and take steps to ensure that information is presented to one another in a way which is easily understood.