



Serious Incident Reporting Policy

September 2026

Purpose

The trustees of the Beaulieu Common Good Foundation (“the Foundation”) are responsible for protecting the Foundation, its assets, beneficiaries, volunteers and reputation, and for reporting serious incidents to the Charity Commission where required.

This policy sets out how the Foundation will identify, consider and, where appropriate, report a serious incident.

The Foundation has no employees and is principally grant-making, but also organises the annual Beaulieu Village Fete. Detailed arrangements for managing health, safety and other risks associated with the Fete are contained in the Fete Event Management and Safety Plan and associated volunteer guidance. This policy complements those arrangements.

What is a serious incident?

A serious incident is an adverse event, whether actual or alleged, which results in, or risks, significant:

- harm to the Foundation’s beneficiaries, volunteers or others who come into contact with the Foundation;
- loss of the Foundation’s money or assets;
- damage to the Foundation’s property; or
- harm to the Foundation’s work or reputation.

Examples could include serious safeguarding concerns, significant fraud or theft, a serious accident connected with the Foundation’s activities, a significant data or cyber-security breach, substantial financial loss, or another event which could seriously affect the Foundation or public confidence in it.

Not every accident, complaint, financial discrepancy or operational problem will constitute a serious incident.

Beaulieu Common Good Foundation

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Reporting concerns internally

Any trustee, Fete Committee member or volunteer who becomes aware of an incident which they believe may be serious should report it promptly to the Chair or, if that is inappropriate or the Chair is unavailable, to another trustee.

Immediate action should be taken where necessary to protect people, property or funds and to notify the emergency services, police or another relevant authority where appropriate.

Trustee assessment and external reporting

The trustees will consider any potentially serious incident promptly, taking account of the Charity Commission's current guidance on reporting serious incidents.

The trustees will consider:

- what has happened and the seriousness of the actual or potential consequences;
- what immediate action is required;
- whether the matter needs to be reported to the Charity Commission or another authority;
- what action is required to prevent or reduce further harm; and
- whether any of the Foundation's policies, procedures or controls need to be reviewed.

Where a report to the Charity Commission is required, it will be made promptly by or on behalf of the trustees in accordance with the Commission's current guidance.

Records and confidentiality

An appropriate written record will be kept of any potentially serious incident, the trustees' assessment of it, action taken and any external reports made.

Information will be shared only with those who need to know, subject to the Foundation's legal and regulatory obligations.

Review

This policy will be reviewed periodically by the trustees and following any serious incident where lessons may need to be incorporated into the Foundation's procedures.