

# Institute Closure Process – Federation Briefing

## Why this matters

To ensure consistency, good governance, and support for members, it's important that all Institutes follow the agreed process when their future is uncertain or they are considering closure.

Early communication allows support to be put in place and ensures all constitutional and charity requirements are met.

## 1. If an Institute is at risk

If an Institute is struggling or unsure about its future:

- It must notify its Federation and Central Office as soon as possible

This allows support to be offered, including:

- Membership development support
- Help exploring alternative options (e.g. merging, restructuring, new formats)

This step is required under the Constitution (page 17, section 6.1)

## 2. Before any closure decision is made

Institutes should:

- Engage with their Federation and Central Office
- Explore all options to sustain the group
- Ensure members are informed and involved

Closure should not happen in isolation, it should be supported and guided.

## 3. If closure becomes inevitable

Once a decision is made:

### a) Financial and asset responsibilities

- All outstanding accounts must be settled
- Remaining funds and assets transfer to the Federation

Required under Constitution (page 17, section 6.2)

### b) Charity compliance (if applicable)

- If the Institute is a registered charity:
- OSCR consent may be required before closure
- Trustees must follow charity law requirements

Required under Constitution (page 17, section 6.3)

### c) Members

Members should be:

- Informed clearly about the closure
- Signposted to other local Institutes or Independent Membership

Support should be provided to help them stay connected to SWI

## 4. What Federations should do

Federations play a key role in:

- Supporting Institutes early when concerns are raised
- Helping ensure the correct process is followed

Confirming:

- Assets and funds have been transferred
- Any charity requirements have been met
- Supporting member transition locally

Required under Constitution (page 20, section 5.1)

## 5. What to avoid

Recent experience has highlighted common gaps:

- Closure happening without notifying Central Office
- Lack of early engagement or support
- Uncertainty around asset transfer and charity obligations

These create governance, compliance, and reputational risks.

## Key message

No Institute should navigate closure alone.

Early communication with Federations and Central Office ensures:

- Support is available
- Members are looked after
- All legal and constitutional requirements are met

## Need support?

If an Institute is at risk or considering its future, please contact:

- Your Federation
- SWI Central Office

We are here to help at every stage.



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