How to use our filesystem

Levels of Access

We divide our files by three levels of access:

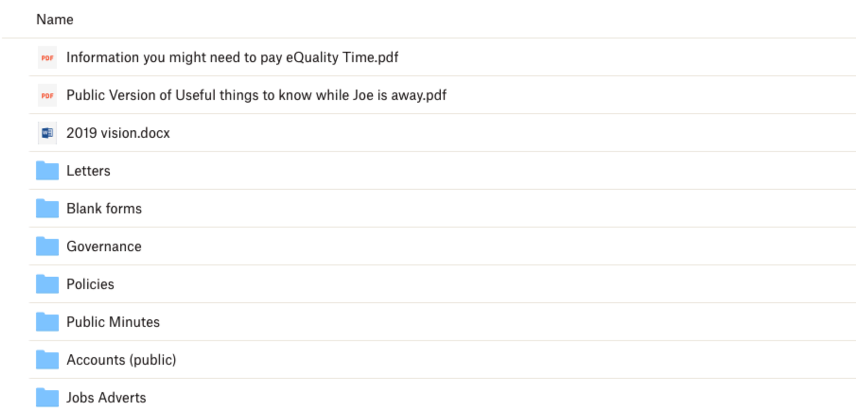
- Files that only trustees and CEO can see, like personal staff information or other information that is held on trust
- Files that only staff and trustees can see
- Files that are Publicly viewable.

In general, we try to place files in the most widely accessible place possible. There should be a reason why something is *not* public rather than a reason is it.

This document covers all levels of access and is itself for all users from members of the public to trustees. If there is some content that you would like but isn't in your access level, get in touch and we'll see what can be moved or redacted.

Publicly Viewable Files

This is what our Public Filesystem looks like.



The following files are available:

- Information you might need to pay eQuality Time.pdf

Regularly, one of the organizations that we invoice asks us to supply some form of information on headed paper. This file is a compilation of all the things we've been asked for including project names and signatures.

- Public Version of Useful things to know while Joe is away

During the Covid lockdown, Joe, the COO, was put on furlough and the trustees ran the organization, he wrote (a version of) this file with all the operational details that trustees might need. It's here as an artifact - trustees should use the much larger version in their section.

- 2019 Vision.docx

 - a document that Joe wrote in 2014 about were we would be in five years. It contains some background on the intent behind the organization.

- Folders

The remaining folders are fairly self-explanatory. 'Governance' contains the documents were submitted to places like Companies House and the Charity Commission when we were setting up. Job Adverts are an archive of old adverts. The other three folders: minutes, accounts and policies are the most used, and they are best place to get a view on how we operate day-to-day and year-to-year.

Staff and Trustees

Name
ISO standards
Insurance
Archive - old EQT Newsletters
Grant Funding Bids and Other Applications
Projects
Branding And Logos

- ISO Standards

A while ago we bought some ISO standards on medical devices. They were expensive and we aren't allowed to share them. We keep them here in case we ever need them again.

- Insurance

Our insurance documents including ones from previous years

- Archive -old EQT Newsletters

Trustees get newsletters on a regular basis. They are currently email but they used to be word files. This is were we keep the old word files.

- Grant Funding Bids And Other Applications

As per the title, this were we keep any of the very large word documents that we fill out when asking for money or other resources. They are sorted by project.

- Projects

This is where project related material is. This includes both general overviews and descriptions as well as subfolders for each project. There is no consistency between folder structures - some folders are literally just a PowerPoint deck for pitching to funders, some contain files relating to projects that have been going on for a decade - in general the folders don't give a complete picture - if only because so much happens publicly and by email, but they do have some use.

- Branding and Logos

Blank versions of our documents, high-res versions of logos. That sort of thing.

Trustees Only

Name
Private Letters
Finance 2020
Conflicts of Interest forms
Minutes
Grant letters and contracts
Staff
Finance Archives

In general, everything in this folder is here because it involves some form of personal information about either staff or trustees.

- Private Letters

Things like “The letter we had to send a school giving assurance that our volunteer was DBS checked, because the dbs check itself wasn’t good enough”

- Finance 2020

In 2020 we moved our finance systems into Quickbooks, which was very positive. Nonetheless there are occasional bits of correspondence and other documentation that needs to be recorded. Such files are put in this folder.

- Minutes (and meeting folders)

Where the minutes live until they are approved and copied ot the public minutes folder. It’s also were we create folders that contain all the materials trustees need for the ‘next’ meeting.

- Grant Letters and contracts

When we win a grant, there’s normally a contract to sign and other paperwork. This is it.

- Staff

Contracts, timesheets and correspondences that involve our staff

- Finance Archives

Material from a few years before 2020. The longer term archives are in longer-term storage (trustees asked for more dropbox room a while back and the finance archives were the big thing that needed taking off)

- Conflict of Interest Forms

Some trustees have a conflict of interest (one of them is Joe’s mum) and we record such things in this handy folder.