



POSITIVE FUTURES

Achieving dreams. Transforming lives.

Name of Policy:	Gifts and Bequests Policy		
Policy Lead:	Finance Director		
Next Review Date:	10.06.24		
Change Record			
Issue Date	Nature of Change	Ratified by	Date ratified
10.09.19	First issue	ED	10.09.19
22.07.22	No changes	FD	20.07.22

Gifts and Bequests Policy

Aims

This Policy aims to define:

- what a gift is and the type of gifts that may be given
- the circumstances in which such gifts may be accepted and, if accepted, what should be done with them
- bequests and how these should be recorded and accepted.

Context

We understand that the people we support, their families / carers, or suppliers of goods or services may wish to show their appreciation by giving a gift.

However, this needs to be considered against the implications of having received the gift. Careful consideration needs to be given to ensure that the person's wish to express his / her thanks is respected alongside our responsibilities regarding the acceptance of gifts.

The person receiving the gift should indicate that a card or note of appreciation is always welcome and, while a gift is not necessary, any gift is accepted on behalf of the Service or Department and treated in line with our Policy.

Policy Statement

You should consider the following when deciding whether or not to accept a gift:

- The nature of the relationship between the person giving and the person receiving the gift
- If it is a person we support, what is his / her understanding of the value of the gift?
- How the giving and receiving of the gift might be viewed by others
- The type of gift.

Gifts will usually fall into four broad categories:

1. Perishable gifts, such as flowers, chocolates, sweets, biscuits and seasonal gifts eg Easter eggs: these gifts should be accepted and, where possible, shared among all the staff in the Service / Department.

If this is not possible then the following should be considered:

- In the case of flowers, they should be displayed in a public area. Under no circumstances should a member of staff take the flowers home.
- In the case of food products, if sharing is not a reasonable option then they should be either auctioned or given away by using a draw / raffle.

2. Non-perishable gifts such as perfume, alcohol, ornaments and books: these should be either auctioned or raffled.
3. Tickets and Corporate entertaining: in some circumstances, staff may be given tickets to events or be invited as a guest by another organisation to an event. Any tickets received should be accepted and used for fundraising internally or, with the donor's permission, externally.

If an individual receives a specific invitation to an event and this is either an opportunity to raise Positive Futures' profile or if a refusal may harm relationships with that organisation, such an invitation may be accepted subject to the approval of the Executive Director.

4. Cash Gifts: under no circumstances should cash gifts be accepted. There are no exceptions. However, if a cash gift is offered, the individual wishing to give the gift should be advised that they may make a donation to the organisation.

In all cases, the manager should record the following information on the Record of Gifts & Bequests (form GB1):

- The date the gift was received
- Name of person receiving the gift
- Name of person giving the gift
- The estimated value and what happened with the gift
- If the gift was accepted.

The record should be signed by the appropriate manager and a copy forwarded to the Finance Director. The Service / Department Manager will consider if a thank you from the Chief Executive would be appropriate.

Bequests

A bequest is property that is given to a beneficiary under the terms of a will.

Bequests can be made to Positive Futures. Any bequests to Positive Futures should be accepted as a donation to the organisation. If the bequest is for a

specific purpose, Positive Futures must consider whether it can meet that purpose before accepting the bequest. Under no circumstances should a member of staff accept a bequest, from which they will personally benefit, from a person we support or family member. If a member of staff becomes aware that they are a potential beneficiary of a bequest, they should request that the donor remove him / her as a beneficiary. The relevant manager should also be informed immediately.

Related Documents

Procedures

Guidance

Process Maps

Forms/Templates
<ul style="list-style-type: none">• Record of Gifts & Bequests

How has this policy been informed by staff, volunteers and the people we support?

The initial policy was subject to review by members of the Directors' team.