



## Gifts, Wills and Bequests

### What this policy covers

The aim of this policy is to maintain the HTCD's reputation by being open and transparent and thereby to protect Combe Down PCC's employees and volunteers (*referred to throughout as you*) from any allegation of corruption or wrong doing.

There may be occasions on which the people you deal with in the course of your work for the church (*referred to as Service Users*) wish to offer gifts or bequests. This policy sets out the Organisation's position on what you should do if that happens.

### Accepting Gifts

Before you accept a gift use the checklist below to see if it is acceptable to do so.

#### Checklist

1. Could others perceive the gift as trying to get preferential treatment at their expense?
2. Would accepting the gift change your professional relationship with the person?
3. Would accepting the gift affect your relationships with your colleagues?
4. Is the gift marking an important point – a milestone, recovery or a celebration when service users may feel a gift is appropriate as part of a caring relationship?
5. Do you believe it is a thank you and not a quid pro quo?
6. Would rejecting the gift be perceived as devaluing it, being rude or impolite?
7. Has the service user or their relatives repeatedly offered gifts?

***If after using the checklist you believe it is right to accept the gift, then you must:***

1. Report the gift in writing to your line manager and explain why you accepted. (email is acceptable).
2. Your line manager must acknowledge your report and confirm whether they believe you have acted in accordance with the checklist in writing (email is acceptable).
3. Line Managers must then forward the correspondence to the finance officer who is responsible for maintaining a central record of gifts accepted and the value (if known).

## Wills and bequests to the Church

If a service user expresses an interest in leaving a bequest to the church, you can direct them to [www.churchlegacy.org.uk](http://www.churchlegacy.org.uk). This guides individuals through making a will and leaving a legacy to a church.

You are also allowed to make arrangements for a solicitor to visit service users at their request, but you must not recommend any solicitor in preference to another.

If someone wishes to make a donation of any kind to the church you should direct them to the finance officer, who will establish the nature of the donation, make arrangements for the donation to be handed over and issue a receipt and a formal acknowledgement.

If a Parochial Church Council (PCC) is a named beneficiary in a will, the PCC are responsible for liaising with the Executor to administer the gift correctly, and ensure they use the funds for their charitable Christian Ecclesiastical purposes.

## Wills and bequests to Church Representatives

If service users intend to make a *personal* bequest to you or to appoint you as an executor, you should inform your manager immediately.

If you are left a sum of money or gifts from the estate of service users, you should report this to your manager as soon as possible.

To protect yourself you:-

- must not be involved in the drafting of a will or act as a witness to a will or as an executor of an estate.
- must not seek a legacy for yourself from any service users who are about to make or change a will.
- should not become involved in disposing of the estate of any service users without the prior approval of your manager.

## Breach of this policy

Any breach of this policy may result in disciplinary action up to dismissal without notice.