

Donations and Bequests Policy

Compass Disability Services

Units 11 – 12 Belvedere Trading Estate
Taunton, TA1 1BH

Date: July 2015

Review date: July 2020

Background

As a charitable organisation providing services to vulnerable people, it is important that the public has confidence in the trustworthiness of Compass Disability Services' employees, trustees and volunteers.

Charitable Donations and Bequests

Like other comparable organisations, Compass Disability Services has limited resources and is in constant need of funds from external sources. Donations and legacies are welcome and used according to the donor's or testator's wishes.

Donations and bequests may be made unconditionally or linked to a particular activity or project. In the latter case, it is advisable for the donor or testator to discuss their intentions with the Chief Executive Officer in advance of making the gift or bequest.

Donations can be made in monetary terms or through the donations of items or assets. Those considering leaving a gift to Compass Disability Services as part of their will are encouraged to seek the advice of an independent will specialist to ensure that they choose the most appropriate legacy for them.

Corporate support is welcomed by Compass Disability Services. We aim to work closely with corporate partners to ensure that funds or donations in kind are used effectively to benefit the charitable aims of the organisation.

Personal Gifts and Bequests

Sometimes, users may feel grateful towards an employee, trustee or volunteer and may wish to show their appreciation in the form of a gift or to identify them as beneficiaries in their will or in some other way. Such gifts and bequests can place our employees, trustees or volunteers in an uncomfortable position. If they were to be routinely accepted, the users and their families or friends could come to believe that the level of service could be influenced by gifts. This is not the case.

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The organisation requires all employees, trustees and volunteers to refuse significant personal gifts valued at £10 or over or offered on a regular basis from customers or other outside parties. This applies to gifts to employees, trustees, volunteers and their families.

The organisation allows employees, trustees and volunteers to accept occasional token gifts valued at less than £10 but only with their Line Manager's approval. All gifts accepted or declined must be declared.

We do not wish to cause distress or offence but we ask users to bear this in mind should they wish to show their appreciation to employees, trustees and volunteers. Users will find that employees, trustees and volunteers will politely refuse any personal offers of significant gifts or bequests.

As per our Whistle Blowing Policy, we encourage a culture of openness and transparency where positive challenge to inappropriate behaviour is part of normal practice. If anyone suspects that gifts have been accepted and not declared they should speak to a line manager.

Policy Revision

This policy will be reviewed every five years and amended as necessary, or earlier in accordance with any forthcoming legislation. All employees should pass suggestions or recommendations for the revision of any aspect of this policy through normal channels to the Chief Executive.

Further Reading

Whistle Blowing Policy

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