


GIFTS AND LEGACIES

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| VERSION No | 2 |  |
| REVIEWED BY | Mariana Philipova | |
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Policy Statement

This organisation believes that its residents have a right to expect that the organisation will be run on an honest and sound financial basis with robust procedures for dealing with and protecting the financial interests of residents.

The Policy

This policy is intended to set out the values, principles and policies underpinning this organisation's approach to the giving of gifts to organisation staff by residents or their relatives. It also aims to set out the organisation's policy on legacies.

It is not uncommon for residents who have developed, sometimes long and close, relationships to individual staff to offer gifts or gratuities, or to seek to include a member of staff in their will. Such activities can, however, lead to accusations of coercion, exploitation and fraud. It is vitally important to this organisation that its staff, at all times, uphold the highest standards, always acting in an honest manner and keeping in mind the best interests of residents. Therefore, in this organisation:

- ✘ Personal gifts should never be accepted by a member of staff
- ✘ Organisation staff should never, under any circumstances, accept valuables belonging to a resident or monetary gifts
- ✘ Any gift given to a member of staff must be declared as soon as is reasonably practicable and details recorded in the Gifts Record in the office; this must include the date that the gift was given and its monetary value and it must be signed by the recipient
- ✘ Organisation staff should never become involved with the making of residents' wills or with soliciting any form of bequest or legacy from a resident; they should never agree to act as a witness or executor of a resident's will or become involved in any way with any other legal document. If a resident does need help with making a will, or requests help from organisation staff, then the resident should be referred to an impartial or independent source of legal advice, such as the local citizens advice bureau or local law society which will hold lists of local solicitors
- ✘ Failure to declare a gift, involvement in a will or attempts to solicit money or items through a resident's will or legacy will be considered a disciplinary offence
- ✘ This policy is cross referenced and linked to the policy on Bribery. Please refer as appropriate.

Training Statement

This policy is included as part of the Induction process for all staff and staff are aware of their limits in respect of this policy

Related Policies
Bribery and Corruption
Code of Conduct
Good Governance