



Age UK Merton Acceptance and refusal of donations policy

Introduction

Age UK Merton welcomes and relies upon donations to help us achieve our charitable aim of supporting older people in the borough of Merton.

Purpose

This policy covers the solicitation and acceptance of gifts by or in the name of Age UK Merton (AUKM). It seeks to ensure that gifts to AUKM are properly received, recorded and administered using appropriate internal controls and that the acceptance and management of gifts are in compliance with external regulations.

For the purposes of this policy, charitable donations and gifts include, but are not exclusively limited to, cash or cheques, property, shares or bonds, tangible personal property (gifts-in-kind), legacy gifts, corporate sponsorship and charitable foundation gifts.

Refusal of donations:

- AUKM will not accept gifts from unknown sources of funding.
- AUKM will take reasonable steps to determine the ultimate source of funding for each gift and satisfy itself that the funds do not derive, directly or indirectly, from activity that was or is illegal.
- AUKM will not accept gifts which are from individuals, groups or organisations which are known to take advantage of older or vulnerable people.
- AUKM will not accept gifts which potentially harm our relationships with other donors, service users, stakeholders or volunteers.
- AUKM will not accept gifts which expose us to undue adverse publicity or reputational risk.
- AUKM will not accept gifts which require unacceptable expenditure or additional charity resources.
- AUKM will not accept gifts which undermine our vision and values.
- AUKM will ensure two members of staff are present when receiving a donation from a vulnerable donor e.g. with illnesses or conditions which affect their judgement.

Implementation of this policy

All staff and volunteers receiving donations to AUKM should be aware of this policy and its contents. AUKM will carry out reasonable due diligence on all donations received.

If a donation is received which may not be acceptable under the terms of this policy the Finance Officer or Community Fundraiser will flag up the issue. This will be researched further by the CEO and the matter will be referred to the board with the necessary information regarding the donation.

All anonymous donations of £25,000 or more will be reported to The Charity Commission as a serious incident.

If a donation is to be refused then the chair of the board of trustees will communicate this. A policy will be created to specify how much information will be given to the donor and also to cover any potential media interest in the matter.

Date Implemented:	Future Review Dates					
	2018	2019	2020	2021	2022	2023
Date reviewed				√		
Date approved By Trustees	√					