

## **GIFTS AND DONATIONS FROM CLIENTS POLICY**

(In the following 'Staff' refers to paid employees and volunteers. The word 'user' means anyone who uses the services of Age UK Surrey directly or indirectly, whether being an individual or another organisation, including Age UK and Age Concern groups.)

It is the policy of Age UK Surrey that staff will not accept personal gifts of cash, or bequests from clients, including their family, relatives or friends.

Staff must explain politely to the client that as it is their job to help them there is no question of them accepting personal gifts of cash for the services given. If the client is insistent on making a cash gift staff should explain, that under Age UK Surrey policy, it can only be accepted as a donation.

If a member of staff has prior knowledge of a client's intention to make a personal bequest in their will, then they should attempt to dissuade the client from doing so. Such instances must be recorded on the client's file and should be reported to the staff member's Line Manager.

Should it transpire that a member of staff is bequeathed a sum of money or a specific gift from the estate of a client, then the staff member should report it immediately to their Line Manager. If necessary, legal advice will be obtained on their behalf and, where relevant, any records that were previously made of the client being asked not to make a bequest must be provided as mitigating evidence.

If a client offers a personal gift such as flowers, chocolate, wine/spirits or a gift voucher, this may be accepted by the individual unless it is inappropriately large. A notional value of £25 per client per year is normally the limit for acceptable gifts.

Any member of staff with doubts as to the offer and acceptance of a gift should refer the matter to their Line Manager.

### **Review**

This policy will be reviewed every three years.

<b>Issue</b>	<b>Date agreed by Board of Age UK Surrey</b>	<b>Reviewed</b>
2	5 <sup>th</sup> April 2011	April 2014
2	17 <sup>th</sup> July 2014	Sept 2017
3	2 <sup>nd</sup> October 2017	