



The Brigitte Trust

Policy on Gifts and Legacies

1.0 Introduction

It is not uncommon for clients who have developed long and close relationships to individual staff and volunteers to offer gifts or gratuities, or to seek to include a member of staff or volunteer in their will. However, such activities can lead to accusations of coercion, exploitation and fraud. It is vitally important to The Brigitte Trust that its staff and volunteers at all times uphold the highest standards of the Trust and always act in an honest manner with the best interests of clients in mind. It is also crucial as a Trust that we protect our volunteers and staff.

2.0 Aims of document:

- Be recognised as part the structure of support for employees and volunteers.
- Encourage communication on matters of concern.
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Therefore, at The Brigitte Trust:

2.1 Personal gifts should never be accepted by a member of staff or volunteer.

2.2 Staff or volunteers should never, under any circumstances, accept valuables belonging to a client or monetary gifts

2.3 Any gift offered to a member of staff or volunteer above £10.00 must be declared to the Services and Development Manager as soon as is reasonable practicable and details recorded in the **Gifts Book** at 316 The High Street, Dorking; this must include the date that the gift was given, its approximate monetary value and must be signed by the recipient and a member of staff.

2.4 Volunteer and staff should **never** become involved with the making of clients wills or with soliciting any form of bequest or legacy from a client which benefits themselves.

2.5 Volunteers and Staff should never agree to act as a witness or executor of a service user's will, nor become involved in any way with any other legal document.

2.6 If a client does need help with making a will or requests help then the client should be referred to an impartial or independent source of legal advice, such as the local

citizens advice bureau, social services or local law society which will hold lists of local solicitors.

2.7 If a volunteer or member of staff is made executor of the will, without their knowledge and this comes to light after death than the individual will endeavour, with the support of The Brigitte Trust to do all he/she can to speak to appropriate organisations in order to delegate this responsibility. This protects the individual and the reputation of The Brigitte Trust.

2.8 Failure to declare a gift above £10.00, the acceptance of a gift in excess of £10.00, the involvement in a will, whether executor or witness, without speaking to the SDM first will be considered a disciplinary matter and the continuing relationship with The Brigitte Trust considered.

Date reviewed	
Date to be reviewed	December 2017
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