


SD-16

## POLICY AND PROCEDURE

### Donations to the Services and Service User Wills/Bequests

Approved by:

  
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Date Effective From:

18-4-2017  
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Review Date:

April, 2020  
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# Carriglea Cáirde Services Procedures Manual

## **Title: DONATIONS TO THE SERVICES AND SERVICE USER WILLS/BEQUESTS**

### **1.0 Scope**

1 1 Donations to the Services and the procedure for dealing with the Wills/Bequests of service users.

### **2.0 Aims and Values**

2.1 To ensure proper accountability for donations to the services.

2.2 To ensure proper procedures in the event of a service user wishing to make a will or a bequest.

### **3.0 Contents**

- 6.0 Donations to the Services
- 7.0 Gifts/bequests to staff
- 8.0 Service User Wills and Bequests

### **4.0 Referenced Documents**

HR-11 Gifts to Staff

### **5.0 Responsibilities**

5 1 Management and all staff.

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## 6.0 DONATIONS TO THE SERVICES

- 6.1 Any person who wishes to make a donation of any kind to the service should be requested to contact the manager who should.
- Establish the nature of the donation.
  - Make arrangements for the donation to be handed over
  - Issue a receipt and a formal letter of gratitude and acknowledgement.
- 6.2 All donations received (no matter how small) are acknowledged
- 6.3 All monetary donations are recorded and lodged to a bank account
- 6.4 In cases where the donor requests that the funds be used for a specific purpose or for a specific area of the services, that request is honoured.
- 6.5 In cases when the donor is a relative of a service user, clarification is sought as to whether the funds were intended for the donor's relative or for the use of the services in general.
- 6.6 Donations are kept separate from the main revenue accounts which are funded by the Health Service Executive.
- 6.7 Donations are used for the following purposes:
- Bridging finance for capital projects where grants do not come through on time to pay contractors
  - Top-up funding for capital projects which may not be fully grant funded
  - Parties, entertainment and outings for service users
  - Any other items which may be deemed appropriate and which are not funded by the revenue budget.
- 6.8 Donations are not normally used to pay staff.

## 7.0 GIFTS/BEQUESTS TO STAFF

- 7.1 There may be occasions where service users or relatives of service users wish to offer gifts to staff. This is covered in our policy on *Gifts to Staff (HR-11)* in the Human Resources Manual.
- 7.2 Where it becomes known that a service user intends to make a bequest to a member of staff, the manager should be informed.

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## 8.0 SERVICE USER WILLS AND BEQUESTS

- 8.1 If a service user seeks advice about making a will, they should be encouraged to do so through a solicitor
- 8.2. The manager may make arrangements for a solicitor to visit the service at the request of a service user, but should never recommend any solicitor in preference to another
- 8.3 Under no circumstances should a member of staff be involved in the drawing up of a will, or act as a witness or as executor to a service user's estate.
- 8.4. Staff should not seek a legacy for the service from any service user who is about to make, or change, his/her will.
- 8.5 If a service user or the relative of a service user asks a member of staff about making a bequest to the Services, they should be referred to the manager
- 8.6 Inclusion Ireland has prepared two guides on making wills, and these guides are designed to be used in conjunction with legal advice from a solicitor. These documents are available from Inclusion Ireland - **Easy to Read Guide to making a Will** and a **Powerpoint presentation on Making a Will.**

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