



Stirling
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Gift Acceptance Policy

Context

The Trustees of Stirling School of English (SSE) SCIO are responsible for assessing and managing any risks to our charity's activities, beneficiaries, property, work and reputation. Money laundering, tax evasion, proceeds of crime and adverse publicity about a donor are examples of how a charity could be exposed to criminal liability resulting in reputational damage. This policy covering solicitation, gift acceptance and refusals, provides staff and those who deal with fundraising with the relevant guidance when seeking major gifts and substantial sums. Responsibility for the acceptance and refusal of gifts sits ultimately with the Trustees of SSE.

Due diligence

1. The Trustees will take all responsible steps (bearing in mind the size and nature of the gift) to ensure that it is aware of the ultimate source of funding for each gift.
2. Potential gifts which may raise issues relating to their acceptability under this policy and/or those which may give rise to significant public interest (positive or negative) will be drawn to the attention of the Chairman at the earliest possible stage.
3. In undertaking the due diligence to assess the acceptability of a potential gift, the Trustees will have regards to data protection and the rights and privacy of prospective donors and will actively seek to distinguish between rumour and matters of confirmed fact or legal findings.

4. All efforts to secure gifts from private sources must be brought to the attention of the Chairman.

Gift Acceptance

- Responsibility for undertaking due diligence in line with the policy falls to the fundraising committee, who will obtain and bring forward all relevant evidence and present both sides of the argument fairly before making a recommendation about a particular gift.
- SSE will be transparent about the sources and purposes of gifts we accept. Where donors wish to remain anonymous, such anonymity will be respected so far as is legally and practically possible.
- Donors will be offered opportunities for continuing engagement with the activities that they have funded but the management and governance of these activities will exist solely with SSE.
- SSE may accept a variety of donations of assets by living donors made on a one-off or regular basis. All are outright and irrevocable gifts. The SSE can also accept planned gifts that take effect on the donor's death.
- The SSE welcomes the following types of outright gifts.
 - ✓ Cash of any amount. Cash donations of more than £100 will need to be approved by the trustees.
 - ✓ Publicly traded shares at fair market values. The board will have full discretion over the sale of any gifted shares.
 - ✓ Land and buildings as long as at the SSE's discretion they may be sold and/or generate revenue for charitable purposes surplus to any costs.
 - ✓ Personal property, as long as the items are saleable, and at a value which will offset any costs the SSE incurs in selling.
 - ✓ Small appreciation gifts to tutors from students and no consent from trustees is required.
- The SSE may also be named as the beneficiary of planned gifts:
 - ✓ Residuary legacies – a gift made of some or all of the remainder of an estate after all other gifts have been handed out and debts paid off.
 - ✓ A pecuniary legacy – a gift made of a fixed sum of money.

- ✓ A specific legacy – a particular named item left as a gift in a will, for example, shares, property, jewellery, furniture or a painting
- The Treasurer is responsible for issuing the official gift receipts for gifts over £100 and donor acknowledgements, and, with the assistance of the accountant, for the proper deposit of gift funds. Volunteer manager is responsible for issuing the official cash gift receipts for donations under £100. Adequate records of all gifts will be kept to allow proper audit trail.

Refusal of gifts

Donations and/or gifts may be legitimately refused in certain circumstances, but this must not be influenced by any personal viewpoints of the Trustees or staff.

SSE will not accept gifts in cases where to do so would, considering all risks:

- Compromise SSE's status as a charitable organisation
- Limit freedom of enquiry
- Create unacceptable conflicts of interest
- Cause material damage to SSE's reputation (including deterring significant numbers of other donors or supporters)
- Cause financial loss to SSE
- Cause damage to SSE
- Be directly in opposition to SSE's mission, objectives and publicly stated vision, values and ethics framework.
- Gifts will not be accepted where the source of the funds is unknown.

SSE will respond promptly to a complaint by a donor or prospective donor about any matter within this policy. A designated Trustee will attempt to resolve the concerns in the first instance. A complaint who remains unhappy may request in writing a review of their complaint by the Chairman and will be advised of the outcome in writing.

This policy is available in a hard copy to donors and prospective donors on request.

Approved by the board on: 18th May 2021

Last reviewed: 16th May 2022