



Family Support Wales

GIFTS AND LEGACIES

Domiciliary Care Agencies (Wales) Regulations 2004
Reg: 13 & 14 Standard: 13 – Financial Protection

Policy Statement

Family Support Wales believes that its Service Users have a right to expect that Family Support Wales will be run on an honest and sound financial basis with robust procedures for dealing with and protecting the financial interests of Service Users.

The Policy

This policy is intended to set out the values, principles and policies underpinning Family Support Wales's approach to the giving of gifts to organisation staff by Service Users or their relatives. It also aims to set out Family Support Wales's policy on legacies.

Policy on Gifts and Legacies

It is not uncommon for Service Users who have developed, sometimes long and close, relationships to individual staff to offer gifts or gratuities, or to seek to include a member of staff in their will. Such activities can, however, lead to accusations of coercion, exploitation and fraud. It is vitally important to Family Support Wales that its staff, at all times, uphold the highest standards, always acting in an honest manner and keeping in mind the best interests of Service Users. Therefore, in Family Support Wales

- Personal gifts should never be accepted by a member of staff if the value of the gift is estimated to be more than £5.00
- Organisation staff should never, under any circumstances, accept valuables belonging to a Service User or monetary gifts
- Any gift given to a member of staff must be declared as soon as is reasonably practicable and details recorded in the Gifts Record in the central office; this must include the date that the gift was given and its monetary value and it must be signed by the recipient
- Organisation staff should never become involved with the making of Service Users' wills or with soliciting any form of bequest or legacy from a Service User; they should never agree to act as a witness or executor of a Service User's will or become involved in any way with any other legal document.

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- If a Service User does need help with making a will, or requests help from organisation staff, then the Service User should be referred to an impartial or independent source of legal advice, such as the local citizens advice bureau or local law society which will hold lists of local solicitors
- Failure to declare a gift, acceptance of a gift in excess of £5.00, involvement in a will or attempts to solicit money or items through a Service User's will or legacy will be considered a disciplinary offence
- This policy is cross referenced and linked to the policy on Bribery. Please refer as appropriate.

Related Policies

Bribery and Corruption

Code of Practice for Workers

Good Governance

Training Statement

This policy is included as part of the Induction process for all staff and staff are aware of their limits in respect of this policy