

# Gifts and Donations Policy

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Edge Hill  
University

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# Gifts and Donations Policy

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## Summary

This policy provides guidance on how the University will process gifts and donations in a manner which retains its independence and integrity.

## Glossary of terms

There are no surprising terms in this policy.

## Purpose

This policy is designed to provide donors, staff and students with information on the University's approach to processing gifts and donations. The policy is complementary to the Financial Regulations. All types of donations are covered by the policy, including gifts of money, land and property, or items for the University's archive collection.

This policy deals only with gifts made to the University. Staff members who are seeking advice on whether to accept a gift made to an individual should consult the Hospitality and Gifts Policy available on the Finance Wiki pages.

Queries on this policy should be addressed to the Head of Corporate Communications, PR and External Relations.

# Gifts and Donations Policy

## 1. Introduction

Contributing towards Edge Hill's work is welcomed by the University as it provides valuable support for various initiatives and helps us to ensure current students can realise their ambitions, helping them fulfil their potential.

While private giving from UK and international donors is encouraged, it is important that the University carefully considers the source of any donation and whether it is appropriate for the University to accept.

This document sets out the University's policy in relation to the acceptance and refusal of donations, gifts, endowments, pledges and legacies.

The ethical decision-making process set out in this policy enables all involved in the donation procedure to make judgements that reflect the University's values and long-term goals.

## 2. Types of donations

Donations are accepted and held in accordance with its Financial Regulations. The following gifts are acceptable (depending on restrictions):

- Payments via the online store [www.store.edgehill.ac.uk/product-catalogue/donations/donations](http://www.store.edgehill.ac.uk/product-catalogue/donations/donations)
- Personal property, which may include artworks, books, memorabilia, coin and stamp collections. Items will be considered in line with the Library and Learning Service Collections Management Policy, which provides a framework for the development and management of donations for its collections and archives;
- Legacies and bequests. The University asks donors wishing to leave a bequest or legacy to execute an appropriate instruction in their will;
- Real estate, including residential, commercial, or undeveloped buildings/land. As Edge Hill is a campus-based University, it is normal protocol that the University would, in consultation with Facilities Management, normally sell a gifted property rather than maintain and manage.
- The acceptance of gifts in any other form than those stated above will be considered on a case by case basis.

### 3. Approval process

Any University member of staff approached by a potential donor should contact the Corporate Communications, PR and External Relations Department as soon as reasonably practicable for consideration and approval.

The Head of Corporate Communications and External Relations or External Relations Manager will take reasonable measures to ensure the University is aware of the source of funding for the donation and will undertake due diligence in line with this policy to ensure that donations are for purposes consistent with the University's values and that no unacceptable legal or reputational issues are raised by their acceptance.

The level of due diligence required will depend on the size and nature of the major donation but should at least include:

- the name of the donor;
- the address of the donor;
- an understanding of the source of funds;
- If the donation is to provide ongoing funding, for instance for a scholarship or award, the financial stability of the donor; and
- a report addressing all issues set out in section 3 below.

In relation to donations of up to £10,000, the Pro Vice-Chancellor (External Relations), having reviewed the donation report, will have the authority to accept or decline any such major donation.

In relation to major donations in excess of £10,000 but less than £50,000, the donation report must be circulated to the Deputy Vice-Chancellor or Vice-Chancellor who shall have delegated authority to accept the donation.

In relation to Major Donations of £50,000 and above, the donation report must be circulated to the Board of Governors and any proposed action must be approved at the next appropriate meeting of the Board of Governors.

In the event there are any concerns in relation to any donation, as set out in section 3 below, approval should be sought from the Board of Governors at the earliest stage possible.

The donor of any donation shall be required to enter into a donation agreement with the University, in such form as the University may specify.

Where appropriate, for instance as a result of a change in circumstances or public perception of a donor, the University reserves the right to review past decisions as to the acceptance or refusal of major donations.

#### 4. The acceptance of donations – issues to consider

The donation report should address the following questions and issues:

Are the purposes of the donation compatible and complimentary to the objectives and values of the University?

Is the donor and/or the source of funds of the donation aligned with the University's values and long-term goals?

What additional costs or burdens, if any, would the donation incur for the University?

A donation will usually be refused if there is any available, credible evidence that the donation will be made from a source that arises from an activity, organisation or individual that:

- takes part in activities that are harmful to the objectives of the University;
- has evaded tax;
- has violated international conventions that bear on human rights;
- results in explicit environmental damage
- has limited freedom of enquiry or academic freedom;
- has suppressed or falsified academic research;
- has been involved in illegal activities or infringed money laundering requirements.

A donation will be refused if the donation, or any of its terms, will:

- require action by the University that is illegal;
- damage the reputation of the University;
- create any conflicts of interest;
- place unmanageable or inappropriate demands on the University;
- place conditions on the University that are contrary to the University's objectives or values or tie the donation in to an activity that is contrary to the University's objectives or values;
- deters donations or gifts from other potential donors;
- be in any way incongruous with the aims and values of the University.

#### 5. Recording and reporting

It is the responsibility of the Corporate Communications, PR and External Relations Department to develop a donor gift agreement in conjunction with the donor and to approve, as outlined above.

In some circumstances, donors might discuss the possibility of making a gift directly with Faculty/Department staff. In these circumstances, the Head of Corporate Communications and External Relations or External Relations Manager should be notified as soon as practicable and provided with all support information and relevant paperwork to be able to proceed with the due diligence needed to make the decision to accept or decline the donation.

Information required for reporting purposes are as follows:

- name and address of donor;
- name of Faculty/Department staff member(s) involved if applicable;
- amount and purpose of gift including details the gift is to support;
- the account and project code to which the gift to be credited;
- copies of supporting letters, proposals, communication with and from the donor;
- Use the HEFCEDON job code to monitor and manage or donations on the financial systems.

## 6. Donors' rights

Donors and prospective donors are entitled to the following information upon request:

- the most recent annual report and financial statements of the University;
- confirmation of the charitable status of the University; and
- a copy of this policy.

The privacy of donors will be respected. Any donor records that are maintained by the University will be kept confidential and the donor will have the right to see their own donor record. The University will also honour a donor's request to limit the frequency of contact from the University if they so wish.

## 7. Other considerations

Edge Hill University is an exempt charity regulated by the Office for Students (OfS). The University is governed through an Instrument of Government and Articles of Government approved by the Privy Council. The terms of our charitable status prevent the University from supporting other charities.

The University does not provide legal advice or financial planning services for donors. Prospective donors should seek the assistance of their own legal and financial advisors in matters relating to donations and to tax and estate planning considerations.

As part of the University's Equality, Diversity and Inclusion work, this policy has been designed to ensure that no-one receives less favourable treatment due to protected characteristics.

This policy also ensures that information about donors is held and processed in accordance with the Data Protection Act 2018 and the General Data Protection Regulation (GDPR), which covers the retention and maintenance of donor details.

## Key to Relevant Documents

- [Bribery and Anti-Corruption Policy](#)
- [Financial Regulations](#)
- [Hospitality and Gifts Policy](#)

## Endmatter

Title	Gifts and Donations Policy
Policy Owner	Pro Vice-Chancellor (External Relations)
Approved by	Resources Committee
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