

# HOPE WELFARE TRUST DONATION ACCEPTANCE & PARTNERSHIPS POLICY

## 1.0 INTRODUCTION

Hope Welfare Trust (the “Hope Welfare Trust”) welcomes and relies upon donations and corporate partnerships to help deliver the Hope Welfare Trust strategic aims and objectives, in particular through the use of such funds and partnerships to inspire hope and improve the health and well-being of our communities in the UK and Jammu Kashmir. We do this by delivering or supporting project and services for the relief of sickness and preservation of health among people, and delivering humanitarian aid to prevent or relieve poverty.

This policy covers the solicitation and acceptance of gifts/donations by, or in the name of, the Hope Welfare Trust. It seeks to ensure that gifts/donations to the Hope Welfare Trust are properly received and administered and that the Hope Welfare Trust acceptance and management of gifts/donations are in compliance with external regulations and the Hope Welfare Trust fiduciary obligations to donors. The policy also covers partnerships with individuals and organisations which propose to offer support, whether paid or unpaid, to the Hope Welfare Trust or its beneficiaries.

For the purposes of this policy, charitable donations and gifts include, but is not limited to, cash, cheques or transfers; property; shares or bonds; tangible personal property (gifts-in-kind); legacy gifts; corporate sponsorship and charitable foundation gifts

## 2.0 PRINCIPLES

The Hope Welfare Trust subscribes to seven principles to underpin the acceptance of gifts and partnerships. The seven principles are set out below, with additional text explaining how the principle applies in practice.

### **2.1 The Hope Welfare Trust should seek philanthropic support which is aligned with its values, strategic goals and financial needs, as a legitimate, sustained and vital component of its income.**

The HWT will not accept gifts or enter into partnerships that:

- Undermine the HWT’s vision and values;
- Do not help fulfil the HWT’s strategic Mission;
- Compromise its status as an independent institution;
- Create conflicts of interest which are not fully transparent and managed appropriately;
- Potentially harm the HWT’s relationships with other donors or stakeholders or inhibit unreasonably, the Hope Welfare Trust ability to seek support from other donors;
- Expose the Hope Welfare Trust to undue adverse publicity or reputational risk;
- Limit freedom of inquiry, suppress and/or falsify research or otherwise restrict the distribution of information relevant to the Hope Welfare Trust beneficiaries and stakeholders;

- Require unacceptable expenditure of additional Hope Welfare Trust resources or cost the Hope Welfare Trust more than the benefit it derives from it.

Gifts and partnerships will be tested against the Hope Welfare Trust current Strategy, copies of which will be made available to donors on request.

This policy will be published on the Hope Welfare Trust web site, accessible to all users.

**2.2 The Hope Welfare Trust must observe the requirements of Charity law and other relevant legislation in relation to the receipt and expenditure of funds. Ultimate responsibility regarding the acceptance and refusal of donations and the entering into of partnerships rests with the Trustees of the Hope Welfare Trust.**

Hope Welfare Trust is a registered charity and will at all times observe the requirements of Charity law and other relevant legislation. The Trustees delegate to the Secretary responsibility for accepting donations or proposed partnerships, except where a donation or partnership may give rise to significant issues for the Hope Welfare Trust. Authority to refuse a donation is retained by the Trustees.

**2.3 Discussions with potential donors or partners that are likely to give rise to significant public interest, or which raise complex questions with regard to acceptability, should be considered at the earliest stage possible by the Secretary, who should be fully informed of the purpose and the background to the donation or partnership and the source of funds.**

The Secretary, in consultation with the Chair of Trustees (or in their absence, the Vice Chair), will determine (subject to Principle 2) whether the approval of the Trustees should be sought with regard to a specific donation or partnership.

**2.4 The Hope Welfare Trust should take all reasonable steps to ensure that it is aware of the source of funding for significant gifts and have processes in place to satisfy it that the funds do not derive from activity that was or is illegal or runs counter to the core values of the Hope Welfare Trust.**

The Hope Welfare Trust will take reasonable steps to determine the ultimate source of funding for each significant gift and satisfy itself that the funds do not derive, directly or indirectly, from activity that was or is illegal or which runs counter to the provisions of this policy.

**2.5 The legal and reputational rights of potential donors and partners should also be considered as part of any due diligence undertaken in assessing the acceptability of a proposed donation or partnership. In this regard, a clear distinction should be drawn between rumour or speculation and matters of confirmed fact or legal finding, whilst also accepting that the Hope Welfare Trust**

**may wish to consider the reputational risks that could be incurred through public perception of any particular donor or partner**

This principle will be applied as part of the consideration of acceptance of a gift or partnership within this policy.

**2.6** Donors of major gifts, given for restricted purposes, must sign appropriate gift agreements to confirm the management and governance of programmes funded through donations. Complex partnerships involving a significant level of activity by the partner and/or the Hope Welfare Trust must also be subject to an appropriate agreement.

Donations of £25,000 and over, given for restricted purposes, must be accompanied by an agreement laying out the relevant terms and responsibilities for the donor and the Hope Welfare Trust. The decision as to whether an agreement is required with a partner will rest with the Secretary.

**2.7** The Hope Welfare Trust should have procedures in place for reviewing and reconsidering previous decisions taken in good faith relating to the acceptance of particular gifts or partnerships if subsequent events or the subsequent availability of additional information require it. The response to such circumstances should be transparent and proportionate to the particular circumstances that have arisen.

In the event that the Hope Welfare Trust is unable to put a gift/donation to the use originally intended by the donor, the Director of Fundraising will recommend a course of action for approval by the Trustees.