

The Blue Hand Group



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PURPOSE

The purpose of this policy is to regulate the acceptance and provide a framework for the distribution of Bequests.

SCOPE

This policy and procedure is for all philanthropic donations received by BHG.

POLICY STATEMENT

BHG is committed to the professional and ethical management of bequests.

The Blue Hand Group (BHG) is a registered charity through the Australian Charities and Not-forprofits Commission and is currently awaiting approval for deductible gift recipient (DGR) status.

BHG can receive charitable donations and encourages bequests.

BHG seeks to build sustainable financial support for its activities.

This policy and procedure recognises the sensitivity of managing bequests and the importance of professional long-term management practices required to optimise bequest opportunities that support the strategic direction of BHG.

BHG values financial support and will honor the agreed purpose of a donation wherever possible but will have ultimate unconditional discretion to redirect the donation.

GUIDELINES AND PROCEDURE

All bequests will be assessed against their suitability, risks, and appropriateness in relation to BHG in accordance with the following criteria:

- is consistent with, and enhances BHGs profile, brand, strategic direction, values, and purpose.
- the agreement and level of support is adequate to meet the BHG's objectives.
- provides mutually beneficial outcomes.
- contributes towards enhancing the well-being of the vulnerable.
- there is no conflict of interest.

BHG will NOT enter bequests of any sort where they:

- do not reflect BHGs core values, strategic direction and brand attributes.
- may be construed as discriminatory.
- may present a reputation risk.
- lead to a real or perceived conflict of interest for BHG or its membership. Refer to the Conflict of Interest Policy and Procedure (to be finalised). All bequests received must be deposited into BHGs bank account. Funds will be allocated to the approved expenses, event or activity.

ACCEPTANCE

1. BHG will only accept bequests where the purpose of that bequest is aligned with BHG's values and strategic direction.
2. BHG will only accept bequests of physical materials or property where it is feasible for BHG to manage and benefit from those items. Where this is not feasible BHG will work with the estate to negotiate suitable alternative arrangements that meet the needs of both parties. Where a donor wishes to specify the use that may be made of the donation then this must be set out in the documentation accompanying the bequest and be subject to approval by the CEO.
3. The CEO, Director, Fundraising, Sponsorship, and Development through the Executive Officer, can accept bequests to the charity.
4. BHG reserves the right to refuse or return a bequest. 14. Written acknowledgement and a formal receipt will be given to all bequest donors and/ or their executors.
5. All bequests will be recorded in a Register.
6. BHG does not refund the monies requested. If a donation is made in error a request for review may be made in writing to the CEO via info@thebluehandgroup.org
7. The CEO on behalf of BHG: has the authority to direct the procurement and management of bequests and will work collaboratively with relevant Board members, employees and Society members to maximise opportunities. The CEO will coordinate approaches for prospective bequests, and
8. All bequests, whether accepted or declined, should be recorded in the relevant BHG database.
9. All bequest records, including finances and correspondence of requests and approvals, will be filed in the relevant BHG database.
10. All bequest activities are to be published in the BHGs Annual Report.

BEQUEST REQUIRING THE OUTLAY OF BHG FUNDS

Bequests to BHG requiring a commitment by BHG to spend funds, either upon receipt or in the future, in addition to prior approval, where appropriate in regards to amounts donated or pledged are to seek the CEOs approval.

Examples are:

- matching funds by BHG
- commitment to continue a project after termination or exhaustion of the donation Bequest Policy and Procedure Effective. Once PRINTED, this is an UNCONTROLLED DOCUMENT. Refer to Policy Site for the latest version.
- commitment to finance and/or administer an undertaking outside the routine functioning of BHG.

RECOGNITION AND ACKNOWLEDGEMENT

BHG will ensure that the donor receives an acknowledgment to the degree that they or the executor is willing. The following guidelines will be used in providing acknowledgment to and recognition of the bequest:

- a letter of acknowledgment will be sent to the family/ executor and a copy will be placed on file.
- public acknowledgment in BHGs promotional materials will normally be restricted to a statement of the donor's name and a display of the logo.
- submit a press release if relevant and if the donor executor is requesting.

The CEO is responsible for honoring the memory and generosity of bequestors through appropriate recognition activity and will maintain links with the family of bequestors.

INDEPENDENT ADVICE

Prospective bequestors should seek the advice of independent legal and/or financial counsel in the bequest planning process. Bequestors are responsible for ensuring that a proposed bequest is in their best interest and furthers their charitable, financial and estate planning goal.

RESPONSIBILITIES

The Director Fundraising, Sponsorship, and Development, CEO, and Executive Officer are responsible for implementing, monitoring, reviewing, and ensuring compliance with this policy and procedure.

REPORTING

The CEO will report on the solicitation, realisation, and implementation of bequests through an annual report to the Board.

DEFINITIONS

Bequests: donations left for BHG in a donor's last will and testament. Bequests may be in the form of property, shares, physical items, a cash amount, or a percentage or remainder of estate.

Bequestor: the person leaving the bequest; a donor who makes a gift through their will.

Conflict of Interest: Can arise if it is likely that a private interest could conflict, or be seen to conflict, with carrying out a person's public or professional duties as per BHG's Code of Conduct.

Funder/ Donor/ Sponsor: any person or organisation donating to BHG.

Goods: means any material gifted or bequeathed to BHG.

RELATED LEGISLATION AND DOCUMENTS

Australian Charities and Not-for-profits Commission

Sponsorship, Fundraising, and Donations Policy, and Procedure

FEEDBACK

Feedback about this document can be emailed to info@thebluehandgroup.org

This document was developed 23/10/2022 and will be updated as needed.