

# **Bishop Hannington Memorial Church PPC Policy**

## **Policy Concerning Legacies and Gifts**

From time to time the PCC receives notification of legacies and gifts left to the church by former members or their relatives and friends.

Unless otherwise directed, legacies and other windfalls form part of general funds pending their allocation to a specific fund or purpose. Our desire is to use legacy income on items of necessary or elective capital expenditure, and/or on specific projects (for example the funding of Voluntary Staff Workers). These decisions will be made by a PCC meeting.

Frequently the notification of the legacy or gift occurs some time after the will was written or instructions given, and because circumstances and needs have changed in the interim, the purpose for which the donor originally envisaged the gift may no longer be appropriate.

In an attempt to deal with such situations, the PCC has therefore agreed the following policy:

### **1) Cash legacies**

Where a cash legacy has been left with a direction or request that it is given for a particular project or need and that project or need no longer exists, the PCC shall instruct its secretary to write to the executors or agents of the testator explaining the position and requesting that the legacy be used for an alternate project or need, as near as possible to the intention of the original request. If the PCC is then unable to accede to the wishes of the testator it may then decide to decline the legacy.

### **2) Gifts in kind**

Where the gift is in kind and the PCC determines that it is unable to use the gift (whether for a purpose expressed by the donor or otherwise), either at the time it is accepted or subsequently, the PCC shall instruct its secretary to write to the donor or donor's agent, explaining that the gift cannot be used and asking permission that either (a) the gift be returned to the donor for use elsewhere or (b) it be sold and the sale proceeds be put towards a use as near as possible to the original intention of the donor. If the donor has died, or his/her whereabouts are not known, the PCC shall be under no further obligation and shall be free to dispose of the gift and use any sale proceeds in whatever way it wishes.

The PCC may decide to decline a gift, either at the time it is made or subsequently, because:

- a) it is a duplicate or near duplicate of something already processed by the church, or
- b) it is of a nature which would conflict with the ethos or theological position of the church, or
- c) it might constitute a danger to persons using the church premises, or
- d) it might be a potential distraction from the worship

### **3) Lifetime Gifts**

Although the above policy is intended to cover gifts left by will to the church there may be occasions when a living person wishes to donate sum of money or make a gift in kind to the church. In that event the criteria outlined above will be adopted by the PCC when deciding whether or not to accept the gift or seek its subsequent disposal.

*Approved by the PCC on 26 January 2010, replacing policy document dated May 2005*

*Reviewed and reaffirmed by the PCC on 22 November 2011*

*Reviewed and reaffirmed by the PCC on 19 November 2013*

*Reviewed and reaffirmed by the PCC on 22 November 2016*

*Reviewed and reaffirmed by the PCC on 21 November 2017*

*Reviewed and reaffirmed by the PCC on 26 November 2019*  
*Reviewed and reaffirmed by the PCC on 23 November 2021*