

# Gifts and Donations Policy

*v0.5 | Awaiting Approval*

Western Equestrian Society | [wes-uk.com](http://wes-uk.com)



# Contents

---

- Document Metadata . . . . . 3**
- 1. Purpose . . . . . 3**
- 2. Scope . . . . . 3**
- 3. Definitions . . . . . 4**
- 4. Policy Statement . . . . . 4**
- 5. Roles and Responsibilities . . . . . 4**
- 6. Policy Detail / Procedures . . . . . 5**
- 7. Related Policies and References . . . . . 5**
- 8. Compliance and Breach Handling . . . . . 6**
- 9. Review and Version Control . . . . . 6**
- 10. Approval Record . . . . . 6**

Gifts and Donations Policy

## Document Metadata

Policy Title	Gifts and Donations Policy
Document Ref.	WES-POL-0012
Version	0.5
Date Published	
Review Date	
Owner (Role)	Secretary
Author	Dan Gwalter
Approved By	
Confidentiality	Public
Status	Awaiting final approval

## 1. Purpose

This policy outlines how the Western Equestrian Society (WES) manages the giving and receiving of gifts and donations — including how they are declared, recorded, and applied in practice.

It protects the integrity of WES by ensuring that all gifts:

- Are handled transparently
- Do not result in personal gain or reputational risk
- Are managed in line with financial controls and member expectations

It also supports the fair and consistent use of donations, class sponsorships, and merchandise contributions for member benefit.

## 2. Scope

This policy applies to all WES Council members, Officers, WES Professionals acting in an official capacity, and anyone organising or delivering Society events. It includes:

- Gifts and hospitality offered to individuals in a governance or operational role
- Items or donations given to WES for use at shows, clinics, or member benefit
- Gifts made by WES to volunteers, officials, or prizewinners using WES funds or donated stock

Sponsorships for shows or classes are covered separately under the Fundraising and Sponsorship Policy.

### 3. Definitions

- **Gift:** Any item, token, benefit, or hospitality given voluntarily without payment
- **Donation:** A monetary or in-kind contribution to WES with no expectation of return
- **Gift-in-Kind (GIK):** Goods or services donated to WES (e.g. merchandise, equipment)
- **Register:** The official WES Gifts and Donations Register maintained by the Secretary
- **Threshold:** The policy reporting threshold for individual gifts, set at £25

### 4. Policy Statement

WES expects all gifts and donations to be handled transparently and appropriately. Individuals in governance roles must not accept personal gifts that could give rise to bias or reputational risk. Donated items should benefit the Society or its members, not individuals, unless a clear and approved exception applies.

WES may give modest gifts to judges, volunteers, or prize winners where this is fair, consistent, and documented.

### 5. Roles and Responsibilities

Role	Responsibility
Secretary	Maintain the Gifts and Donations Register; provide advice on declaration
Treasurer	Record any donated items of financial value; ensure compliance with audit
Chairperson	Review high-value or sensitive cases; decide on referral to Council
Event Leads	Ensure appropriate use of gifts and stock at shows or clinics
All Role Holders	Declare gifts above the threshold; avoid personal retention without approval

## 6. Policy Detail / Procedures

---

### 6.1 Receiving Gifts (Individuals)

- Gifts under £25 may be accepted and retained if they are modest, occasional, and not linked to a decision or contract
- Gifts over £25 must be declared and referred to the Secretary
- Repeated gifts from the same source must be treated with caution, regardless of individual value
- Items not suitable for personal retention may be repurposed for member benefit (e.g. raffle prizes, awards)

### 6.2 Receiving Donations (to WES)

- Donations of goods or services must be declared to the Secretary and logged (e.g. branded stock, rosettes, equipment)
- Monetary donations must be processed through WES accounts
- Items donated must not be used for personal gain by officers of the society

### 6.3 Giving Gifts (by WES)

- Modest gifts may be given to judges, long-standing volunteers, or officials — typically non-cash and under £25
- Prize items must be linked to published awards criteria and approved by the Show Co-ordinator
- All gifts issued using WES funds or stock must be recorded in event documentation
- Repurposed donated items (e.g. halters, merch) must be clearly logged and distributed in a fair and visible way

### 6.4 Declaration and Recording

- The Gifts and Donations Register must include:
  - Name and role of recipient (or event if group use)
  - Donor name and item description
  - Estimated value
  - Final decision or use
- The Register is reviewed annually and summary statistics shared at the AGM

## 7. Related Policies and References

---

- Conflict of Interest Policy
- Financial Controls Policy

- Fundraising and Sponsorship Policy
- WES Expense Policy
- Gifts and Donations Register (Templates and Tools folder)

## 8. Compliance and Breach Handling

---

Undeclared gifts, personal use of donated items, or misuse of WES funds for gifting purposes may be treated as a governance breach and referred to the Chair. Disciplinary action may follow where appropriate.

## 9. Review and Version Control

---

Version	Date	Author	Changes Made
0.1	24/06/2025	DG	Initial draft
0.2	18/07/2025	DG	Expanded to include gifts by WES and donated merchandise
0.5	08/10/2025	DG	Updated post Chairman's review

## 10. Approval Record

---

Approved By	Date	Notes
Full Council	[To complete]	Approved for implementation