



MACARTHUR ANGLICAN SCHOOL

Established traditions, proven success!

Donations and Gift Acceptance Policy

Macarthur Anglican School receives gifts and manages funds to support the interests of the school, including facility and programme development and the funding of scholarships. The School uses transparent and ethical processes for the acceptance of gifts, so as to protect the interests of donors and the School.

This policy informs donors, members of the school community and Macarthur Anglican School staff about the framework used by the School that governs acceptance of gifts.

Reference to the 'School' in this policy includes reference to School Council members, Macarthur Anglican School staff and any other person who is authorised to solicit or accept gifts on behalf of the School. Reference to 'gifts' in this policy includes, but is not limited to, gifts of cash, real property, valuable items and gifts made in wills and bequests.

Donation and Gift Acceptance

- The School will welcome, appreciate and respect the interests of individuals and corporations seeking to make a gift to the School.
- Gifts will only be sought and accepted if their acceptance is consistent with the School's ethos and objectives.
- The School will, to the extent that it is legally and practically possible, ensure that gifts are used in accordance with the donor's wishes.
- The School will issue written receipts or acknowledgements for all gifts.
- The School will ensure that donors receive appropriate acknowledgement and recognition for their gifts.
- If a donor wishes to remain anonymous, the School will take all reasonable steps to ensure that information about the gifts and the donor is kept confidential.
- The School encourages all donors to seek independent professional advice about the taxation status or any other legal implications of their gift or potential gift. The School will work with any such advisors to assist with the donor's gift arrangements.

- The School will not be held liable for any advice received by a donor from a third party in relation to a donation. Nor will the School be held liable if a donor declines advice from a third party in relation to a donation.
- The School will manage the storage of information about donors and their gifts confidentially, in accordance with applicable laws and in accordance with Macarthur's Privacy Policy.
- Gifts made to the School's Deductible Gift Recipient (DGR) endorsed funds will only be accepted if they comply with the rules of the DGR fund and if the acceptance complies with Australian Tax Office requirements for DGR funds.
- Gifts will not be accepted if they arise in whole or in part from any activity which, in the School's opinion, may damage the reputation of the School.
- Gifts will not be accepted if a donor indicates an expectation of any advantage as a result of making the gift, noting that the usual forms of donor recognition may be offered by the School at the school's discretion.
- The School will ensure that anyone authorised to solicit a gift on its behalf will be made aware of this policy and in particular, the expectation that the person will avoid actual and apparent conflicts of interest.
- The School will not accept gifts that it considers to be too difficult or too expensive to administer.
- The School reserves the right to decline acceptance of a gift.
- Acknowledgement of a gift will not include, or be seen as, an endorsement of an individual, product or a business.

Donation and Gift Refunds

Requests for refunds or gifts will be considered and determined on a case by case basis. Decisions regarding refunds will be made by the Headmaster or his delegate (usually the Business Manager) who may also, in his or her discretion, seek guidance from the School Council on the question of whether a refund should be made.

If a financial refund is made, it will be returned to the bank or credit card account originally debited.

When a refund request is received, the Headmaster or his delegate will assess the reason given for the refund request. The following reasons will usually be considered favorably:

- The School has made an error;
- The donor's banking details were fraudulently obtained and used; or
- The donor had previously requested that debits be cancelled.

The School may issue a refund on the ground of financial hardship – however this refund will be to the maximum of the last debit or gifted amount. All refund requests will be considered on a case by case basis, but the School is unlikely to issue a refund only on the grounds that the donor has had a change of mind.

The School will not issue a refund of a gift made in the previous tax year, unless there are special circumstances, and this refund is authorised by the School Council.