

Bequest Policy and Procedure

Gawler & Districts Health Advisory Council Inc. (and/or its survivor)

Any person may leave property to the Gawler & Districts Health Advisory Council Inc. (HAC) by way of a Will. The gift may be in the form of real property, i.e. land (left by devise) or personal property of any description including money, investments, goods and actionable rights (left by bequest) and for the purposes of this policy statement both of these forms of gift by Will are referred to as a "bequest". Any bequest may be for any purpose connected with the provision of health services or any of the functions of the Gawler Health Service.

The conditions of any bequest should not prevent the HAC from, or hinder it, in properly performing or exercising its functions or powers. But in any case the Gawler Health Service may carry out the conditions of any such bequest. A bequest should be made to the HAC and not to any individual connected with it, such as a community member, health service employee or presiding member. All proposed bequests must be referred to the HAC to determine whether to accept a bequest with its conditions, or to ensure adequate planning is undertaken to comply with the conditions of the bequest. Bequests shall be applied to the area within the Gawler Health Service to which they have been left. Any variation to the terms of the bequest can only be made in accordance with the law and such matters to be referred to the Presiding Member and the committee members of the HAC.

Having received the bequest, the HAC should provide feedback to the executor of the estate on how the bequest was used within the Gawler Health Service. All bequests should be recorded in an appropriate manner in the HAC Annual Report. A bequest register/database shall be maintained by the HAC.

Procedure

The following procedures shall be followed:

Take a note of the prospective donor's name and address, telephone number and if possible the type of bequest, any terms on which the donor intends to make the bequest and the name of his or her legal adviser. Tell the prospective donor that detailed information of their details will be passed on. Indicate that the donor should expect someone to contact them within Fourteen (14) days. Inform HAC Presiding Member of the details of the inquiry, including the name, address and the telephone number of the prospective donor.

Upon receiving details of a possible bequest check with the Presiding Member

1. That the HAC can comply with any conditions that apply to the bequest; and for any impediments to the HAC being able to utilise the bequest (e.g. arising out of the nature of the gift, bearing in mind that the HAC is an incorporated body). Contact the prospective donor by telephone (or in person) to:
 - a. Thank the person for their enquiry and confirm that bequests of this kind are best left to the Gawler Health Service.
 - b. Explain any problem with the bequest they propose to make.
2. Subject to any condition that apply to the bequest (eg to be used to buy a new hospital equipment), explain that any bequest will be used in connection with the provision of health services to any of the functions of the Hospital.
 - a. Explain also that if any conditions are made with the bequest, unless there are problems identified, these can be carried out as well.
3. Suggest the person discuss the matter with his or her legal adviser. Write and confirm the discussion, including any details of the bequest. Notify the HAC of the potential bequest.



Form of Bequest

The following form of words should be recommended to those thinking about leaving a simple bequest. If not a simple bequest, it should be suggested that the potential donor seek legal advice;

"I give the sum of \$ _____ (or if not a gift of cash, describe the nature of the bequest, e.g. name or description) to the Gawler & Districts Health Advisory Council Inc. (and or Trustee) for any purpose connected with the provision of health facilities at the Gawler Health Service, or any of the functions of the hospital service, and direct that the Gawler & Districts Health Advisory Council Inc. may use the bequest in any manner which at its discretion it may decide".

