



## Donations Policy

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Next Review: Oct 2028

Rosehill Housing Association Limited  
250 Peat Road, Glasgow, G53 6SA  
Tel: 0141 881 0595, Email: [admin@rosehillhousing.co.uk](mailto:admin@rosehillhousing.co.uk)  
[www.rosehillhousing.co.uk](http://www.rosehillhousing.co.uk)



## 1. Introduction and Purpose

1.1 Rosehill, like many businesses, receives requests for donations from local groups and community organisations. Therefore, it is important to have a Policy to govern the arrangements for considering and granting donation/funding requests. This Policy will cover:

- The circumstances in which donations will be considered;
- The circumstances in which donations will not be considered

1.2 This Policy is in place to ensure clarity for staff and committee when decisions are being considered in relation to donations.

1.3 This Policy will ensure openness and transparency to the Management Committee, staff and external stakeholders including the bodies which regulate the activities of Rosehill.

## 2. Our Vision, Values and Strategic Objectives

### 2.1 Our Vision:

"We will provide excellent quality affordable and efficient homes in neighbourhoods that are well managed and maintained; we will contribute to sustaining communities where people feel safe and want to live by providing housing and other services and working with our voluntary and statutory partners."

### 2.2 Our Values:

Our values underpin the delivery of our strategic objectives

- We will
  - Invest and Support
- We will be
  - Engaged and Responsive
  - Accountable and Compliant
  - Fair and Approachable
  - Efficient and Responsible
  - Excellent and Committed

### 2.3 Our Strategic Objectives:

1. Provide high quality affordable homes
2. Engage effectively with our tenants and service users

3. Deliver value for money
4. Be innovative and risk aware
5. Build and contribute to effective partnerships
6. Use resources efficiently and effectively
7. Achieve the highest standards in all that we do

### 3. Constitutional and Regulatory Framework

3.1 Rosehill's Rules (78.2) require the Management Committee to set out and review periodically its policy for the donation of funds to charities or other voluntary groups. Such donations must further the objects of the Association, which is a registered Scottish charity, and the Committee will report to the Members on such donations made.

3.2 Rosehill's objects, as set out its Rules, are:

- to provide for the relief of those in need by reason of age, ill-health, disability, financial hardship or other disadvantage through the provision, construction, improvement and management of land and accommodation and the provision of care, and;
- any other purpose or object permitted under Section 24 of the Housing (Scotland) Act 2010 which is charitable both for the purposes of Section 7 of the Charities and Trustee Investment (Scotland) Act 2005 and also in relation to the application of the Taxes Act.

3.3 The Scottish Housing Regulator, as part of its Regulatory Framework, sets out the standards it requires Registered Social Landlords (RSLs) to comply with. As part of The Standards of Governance and Financial Management we are required to conduct Rosehill's affairs with honesty and integrity (Standard 5). Guidance 5.1 states "The RSL conducts its affairs with honesty and integrity and, through the actions of the governing body and staff, upholds the good reputation of the RSL and the sector."

### 4. Donation Requests to Rosehill

4.1 Rosehill is a not for profit, charitable registered housing association. Its main source of income is the rental income from its tenants and as such Rosehill has a duty to ensure that its income is used wisely.

#### **Annual Budget**

4.2 The Management Committee as part of its annual budgeting processes will set a budget for donations/funding requests. The Management Committee has set the maximum amount for individual donations/funding

applications at £500. In general, only one donation/funding application will be considered per organisation per year.

- 4.3 The Director has delegated authority to grant up to £500 to an appropriate charity/voluntary group who complies with the qualifying criteria as set out below.
- 4.4 In exceptional circumstances, more than one application from the same organisation or an application for more than £500 may be considered. Such applications will be presented to the Management Committee for consideration and decision. It is at the Committee's discretion whether to award further funding in such cases but the maximum overall award will not exceed £1,000.

### **Qualifying Criteria**

- 4.5 The qualifying criteria:
- The charity or voluntary group must be based in or operate in the same geographical area as Rosehill.
  - The organisation must be not for profit, legally constituted and have a bank account. Evidence of this must be provided as part of the donation/funding application.
  - The project, initiative or event must benefit directly or indirectly Rosehill's tenants and the local community it works within.
  - The project, initiative or event must support one of the following priorities:
    - Children and Young People
    - Mental Health
    - Social Isolation
    - Digital Exclusion
    - Food Poverty/Fuel Poverty
    - Training and employability services that maximise individuals' employability opportunities:
      - Digital Inclusion
      - Training
      - Skills Development etc.

### **Non eligible organisations**

- Non constituted groups.

- Donations/funding will not be granted to individuals where the individual could be seen to personally benefit financially;

### **Donation/Funding Application**

- 4.6 All donation/funding requests must be made via our funding application form. All applications must be accompanied with the required supporting evidence i.e. charitable status, constitution and recent bank statement.

## **5. Reporting**

- 5.1 The Director will be responsible for providing quarterly reports to the Management Committee on any requests received, details of the organisations granted donations/funding and the amount awarded and, any applications refused.
- 5.2 The Chair will provide a report to Members at the AGM on any donations/funding granted in the financial year.

## **6. Promotion of Funding**

- 6.1 We are keen to support local groups, organisations and charities whose work will contribute to our priorities (see para 4.5). Therefore, following Committee setting the annual budget for donations/funding, this will be promoted on our website.
- 6.2 We will share good news stories of groups, organisations and charities we have supported through funding. Stories may be published on our website, social media and our newsletters. We may also invite groups, organisations and charities to come along to our AGM and share with our Members the work they do and how Rosehill has supported them.
- 6.3 To support the promotion of our fund and to share good news stories, recipients of funding may be asked to provide feedback on how the funding was used and what difference it made to their project.

## **7. Risk**

- 7.1 In all key areas of our business we need to consider any risks which may arise. To this end we have in place a robust Risk Management Policy and from this flows our Risk Registers. We have identified our strategic risks which are regularly monitored by our Management Team, Audit & Risk Sub-Committee and the Management Committee.
- 7.2 This policy seeks to mitigate risks associated with providing donations or funding, by providing staff, Committee Members and our wider

stakeholders with clarity on our approach to receiving and approving donations/funding applications.

## 8. Equality and Human Rights

8.1 Rosehill's Equality and Human Rights policy (January 2024) outlines our commitment to zero tolerance of unfair treatment or discrimination towards any individuals or group of individuals, particularly those belonging to a protected characteristics (as defined by the Equality Act (2010)). This includes ensuring everyone has equal access to information and services, by making copies of all policies available in a variety range of alternative formats (i.e. large print, translated, etc.) in response to reasonable requests.

8.2 Rosehill is aware of the potential for policies to inadvertently discriminate against individuals or group of individuals. To help address this we carry out Equality Impact Assessments (EIA) to help identify any part of a policy that may be discriminatory so this can be addressed (please see Section 9 of our Equality and Human Rights policy for more information).

8.3 In accordance with our Equality and Human Rights Policy, we have carried out an EIA on this policy which is appended to the end of this policy.

or

8.3 As this policy applies equally to all groups, Rosehill (with committee approval) made the decision not to carry-out an Equality Impact Assessment on this policy.

## 9. Data Protection

9.1 On the 25<sup>th</sup> May 2018 the legislation governing data protection changed with the introduction of the General Data Protection Regulation (GDPR). Following the UK's exit from the EU, and the end of the transition period which followed, the GDPR formed part of the retained EU law and became the UK GDPR which together with the Data Protection Act 2018 constitute the UK's data protection legislation.

## 10. Appeals and Complaints

10.1 All appeals will be referred to Rosehill's Management Committee whose decision will be final. There is no further course of appeal. Should someone feel that they have been treated unfairly, or that the policy is

discriminatory in any way, they can use Rosehill's complaints handling procedure. A copy of this procedure is on our website and also available from our office.

## 11. Policy Review

- 11.1 This Policy will be reviewed, as a minimum, every 3 years. It can be reviewed sooner to comply with relevant changes in legislation or if the monitoring/reviewing of donations/funding provided, highlights any changes required.