

Gifts and Hospitality Policy

Contents

1. Aims	1
2. Legislation and guidance.....	1
3. Definitions	2
4. Roles and responsibilities	2
5. Acceptable gifts and hospitality	3
6. Unacceptable gifts and hospitality.....	3
7. Declining gifts and hospitality	4
8. Monitoring arrangements.....	4
9. Links with other policies.....	4
Policy Amendment Record	
Appendix 1: Gifts and Hospitality Register.....	5

1. Aims

This policy aims to ensure that:

- The academy trust's funds are used only in accordance with the law, its articles of association, its funding agreement and the latest Academy Trust Handbook.
- The trust and those associated with it operate in a way that commands broad public support.
- The trust has due regard to propriety and regularity, and ensures value for money, in the use of public funds.
- Trustees fulfil their fiduciary duties and wider responsibilities as charitable trustees and company directors.
- Members, trustees and staff are aware of what constitutes acceptable gifts and hospitality, and the process that must be followed if they are presented with any of the same.

2. Legislation and guidance

This policy is based on the [Academy Trust Handbook](#), which states that academy trusts should have a policy and register on the acceptance of gifts, hospitality, awards, prizes or any other benefit which might be seen to compromise the personal judgement or integrity of members, trustees, staff and/or any other

representative of the trust. The handbook also states that the Trust should ensure that all staff are aware of this policy.

This policy also complies with our funding agreement and articles of association.

3. Definitions

Gifts are any items, cash, awards, prizes, goods or services, offered without expectation of payment or benefit. Gifts also include goods or services offered at a discounted rate, or on terms not available to the general public.

Hospitality is defined as food, drink, accommodation or entertainment (such as cultural or sporting events) provided free of charge, heavily discounted or on terms not generally available to the general public.

4. Roles and responsibilities

4.1 Members, trustees and staff

Members, trustees and staff:

- Must not give or accept gifts or hospitality to or from a third party where it might be perceived that their personal integrity has the potential to be compromised, or that the trust might be placed under any obligation as a result of acceptance.
- Must not use their official position to further their private interests or the interests of others.
- Must not solicit gifts or hospitality.
- Must record any gifts or hospitality offered to them or the trust with a value of over £25 on the gifts and hospitality register (see appendix 1) within 7 working days, even if declined.
- Must consult the Headteacher or Director of Finance before accepting or offering any gifts or hospitality with a value of over £25.

4.2 Academy trustees

Academy trustees will ensure that the trust's funds are used in a way that commands broad public support, pays due regard to propriety and regularity, and provides value for money.

4.3 The School Headteachers

The Headteachers are responsible for ensuring that all staff are aware of and understand this policy, and that it is being implemented consistently.

The Headteachers will act with the utmost integrity on all matters relating to gifts and hospitality, ensuring that they set a good example to the rest of the school and trust and to those outside the organisation.

They will also ensure, alongside the Director of Finance, that decisions on whether individuals or the trust can accept or offer gifts or hospitality with a value of over £25 are in line with this policy.

The headteacher is responsible for communicating the Trust's rules and expectations about gift-giving to parents.

4.4 The Director of Finance

The Director of Finance will ensure that:

- The trust maintains a gifts and hospitality register.
- Figures for transactions relating to gifts made by the Trust are disclosed in the Trust's audited accounts, in accordance with the Academy Trust Handbook
- The academy trustees and Headteachers are provided with information on gifts and hospitality received and given, as appropriate.

They will also ensure, alongside the School Headteacher, that decisions on whether individuals or the Trust can accept or offer gifts or hospitality with a value of over £25 are in line with this policy.

4.5 The School administrators

School administrators are responsible for maintaining the school's gifts and hospitality register on a day-to-day basis.

4.5 Parents and carers

- Gift-giving is not a requirement, and parents/carers are not expected to buy gifts for class teachers or other school staff. However, the Trust does not wish to discourage all gift-giving and understands that small suitable tokens of gratitude at an appropriate time are always appreciated.

5. Acceptable gifts and hospitality

5.1 Offers of gifts and hospitality received

Members, trustees and staff can accept gifts and hospitality that have a value of up to £25. These do not have to be pre-approved or recorded on the gifts and hospitality register.

Generally, gifts of nominal value, such as small tokens of appreciation, may be accepted. If in any doubt, members, trustees and staff must consult the Director of Finance or Headteacher.

Similarly, hospitality such as working lunches may be accepted in order to maintain good relationships with key contacts, provided the hospitality is reasonable in the circumstances. If in doubt, guidance must be sought from the Director of Finance or Headteacher.

Any gifts or hospitality offered with a value of over £25 must be recorded on the gifts and hospitality register within 7 working days, even if declined. Any member, trustee or member of staff who is offered such gifts or hospitality must consult the Director of Finance or School Headteacher before accepting.

If the Headteacher is the recipient, or intended recipient, of **any** offer of gifts or hospitality, they must inform the CEO and record the offer on the gifts and hospitality register.

Failure to declare any offer of gifts or hospitality on the register in line with this policy will be treated as a staff disciplinary matter.

5.2 Offers of gifts and hospitality given

Any gifts or hospitality provided by the Trust, such as a working lunch for visitors, must not be extravagant. A maximum value of £15 for working lunch and £25 for working dinner should be used as a guideline.

Alcohol must not be purchased out of the school or Trust budget.

Expense claims should be made to the Trust finance team and receipts must always be enclosed.

The Director of Finance or Headteacher must be consulted about any proposal to provide gifts or hospitality with a value of £15 or over.

6. Unacceptable gifts and hospitality

The following must never be offered or accepted:

- Monetary gifts.
- Gifts or hospitality offered to family members, partners or close friends of members, trustees or staff.
- Gifts or hospitality from a potential supplier or tenderer in the immediate period before tenders are invited or during the tendering process.
- Lavish or extravagant gifts or hospitality, even if they relate to activities the recipient undertakes in their own time. This list is not intended to be exhaustive.

7. Declining gifts and hospitality

Any member, trustee or staff member who is offered any of the unacceptable gifts or hospitality, including those outlined in section 6 above, should politely decline the offer.

If they feel it would not be appropriate for them to decline, they should refer the matter to the Headteacher or Director of Finance. The Headteacher or Director of Finance may decline the offer or donate the gift or hospitality to a worthy cause and must also record the offer on the gifts and hospitality register.

Disciplinary action will be taken against anyone who fails to decline gifts or hospitality the Trust has deemed unacceptable or refer unacceptable gifts to the Headteacher or Director of Finance.

Failure to declare any gifts or hospitality offered on the gifts and hospitality register, in line with this policy, will be dealt with as a staff disciplinary matter.

In some cases, the giving or receiving of unacceptable gifts or hospitality may be an act of fraud. If there is reason to believe that fraud has been committed by any member, trustee or staff, this will be dealt with in accordance with the Trust's fraud policy and response plan.

8. Monitoring arrangements

The gifts and hospitality register is monitored regularly by the Director of Finance. This policy will be reviewed as required and every 3 years by the Finance Audit and Risk Committee and approved by the Trust Board.

9. Links with other policies

This gifts and hospitality policy is linked to the:

- Ivy Education Trust Code of Conduct
- Ivy Education Trust Disciplinary Policy
- Ivy Education Trust Finance Policy and Financial Regulations

POLICY AMENDMENT RECORD

Date	Reviewed By	Nature of Change	Next Review
November 2020	J Newman	New policy OLT update for expanded Trust. Adopted by Trustees on 15 December 2020.	As required or by December 2024
Sept 2024	GW	Amended as IET and changed Academies Financial Handbook to Academy Trust Handbook. Changed to review every 3 years.	As required or by September 2027
March 2026	GW/JN/KQ/FAR	Amended CFO to Director of Finance. Added 4.5 Parents & Carers. Added wording around fraud. Updated policy approval process. Increased values permitted for gifts/hospitality before declaration.	As required or by March 2029.

Appendix 1

Gifts and Hospitality Register					
Date	Name	Description of gift/hospitality and approximate value	Party offering gift/hospitality	Accepted/rejected	Approved by