

# Manor Hall Academy Trust



## GIFTS & HOSPITALITY POLICY

The Directors of the trust, in line with the Scheme of Delegation and Articles of Association have overall responsibility for the effective operation of MAT policies, but has delegated day to day responsibility to the Headteacher and LAB.

Directors will take account of recommendations from individual schools in review of this policy and seek HR advice as to such revisions.

Date	Version	Reason For Change	Overview of Changes Made	Source
11/12/20	1	Scheduled Review	None	Directors
25/2/12	1	Strengthen Policy	KEY as source cross referenced with current version	Directors
Spring 22	1	Unions Consultation	Renamed to Gifts and Hospitality. Minor changes throughout	
Spring 23	1	Review	No Changes	kstaples

# MANOR HALL ACADEMY TRUST

## CODE OF CONDUCT GIFTS AND HOSPITALITY POLICY

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## 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 Academies 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
- This policy applies to all staff, including volunteers, and may be amended at any time in consultation with the recognised trade unions
- 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 Academies 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.

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 gifts or hospitality offered to them or the trust on the gifts and hospitality register within 7 working days (save for exceptional circumstances), even if declined. The Trust advise that all gifts and hospitality over the value of £25 are recorded.
- Must consult the CFO or headteacher 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 headteacher

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

The headteacher 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 CFO, that decisions on whether individuals or the trust can accept or offer gifts or hospitality with a value of over the value of £25 are in line with this policy.

## 4.4 The CFO

The CFO 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 Academies Financial Handbook
- The academy trustees and headteacher are provided with information on gifts and hospitality received and given, as appropriate

They will also ensure, alongside the 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 Trust

The Trust is responsible for maintaining the gifts and hospitality register on a day-to-day basis.

# 5. Acceptable gifts and hospitality

## 5.1 Offer of gifts and hospitality received

Members, trustees and staff can accept gifts and hospitality that have a value of up to £25, however they must be recorded on the gifts and hospitality register.

Staff may receive gifts as a thank you from parents, children, etc providing the gift is not obviously outrageous. As a general rule, gifts such as chocolates etc are usually shared with the whole staff group. If in any doubt, members, trustees and staff must consult the CFO or headteacher.

Similarly, hospitality such as working lunches may be accepted and/or provided 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 CFO or headteacher.

Any gifts or hospitality offered over the value of £25 must be recorded on the gifts and hospitality register within 28 working days, even if declined. Any member, trustee or member of staff who is offered such gifts or hospitality must consult the CFO or headteacher before accepting.

If the headteacher is the recipient, or intended recipient, of **any** offer of gifts or hospitality over the value of £25, they must inform the chair of the board of trustees and record the offer on the gifts and hospitality register.

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

You do not need to register gifts and hospitality which are not related to your role as a member of the School staff, such as Christmas gifts from your friends and colleagues.

## 5.2 Offer 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 £25 should be used as a guideline.

Staff should not personally buy gifts for children where a familial or similar close relationship does not already exist.

Children in Residence will have their Birthday recognised in Residence via the residential budget; a card and cake being from all the residential personnel.

Alcohol must not be purchased out of the school budget.

Expense claims should be made to the relevant staff member and receipts must always be enclosed.

The CFO or headteacher must be consulted about any proposal to provide gifts or hospitality with a value of over £25.

## 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 members, trustee or staff member who is offered any of the unacceptable gifts or hospitality outlined in section 6 above should politely decline the offer and advice can be sought from the CFO from the central team.

If they feel it would not be appropriate for them to decline, they should refer the matter to the headteacher or CFO. The headteacher or CFO 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 may be taken, following investigation, where it has been proven that employees have failed to decline gifts or hospitality the trust has deemed unacceptable.

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.

## 8. Monitoring arrangements

The gifts and hospitality register is monitored regularly by the CFO.

This policy will be reviewed every three years by the CFO and approved by the board of directors.

## 9. Links with other policies

This gifts and hospitality policy is linked to the:

- Staff code of conduct
- Discipline Policy
- Finance Policy

All can be accessed via Parago.