



Fulston Manor Academies Trust

# **Gifts & Hospitality Policy**

Fulston Manor School  
South Avenue Primary School

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**Member of Staff Responsible:**

**Mrs S Francis  
Trust HR & Business  
Director**

**Contents**

1. Aims
2. Legislation and guidance
3. Definitions
4. Roles and responsibilities
5. Acceptable gifts and hospitality
6. Unacceptable gifts and hospitality
7. Declining gifts and hospitality
8. Monitoring arrangements

Appendix A : gifts and hospitality register

## **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 Financial 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 Academies 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. As detailed below:

The academy trust should have a policy and register on the acceptance of gifts, hospitality, awards, prizes or other benefits that might compromise their judgment or integrity and should ensure all staff are aware of it. When making gifts, the trust **must** ensure the value is reasonable, is within its scheme of delegation, the decision is documented, and achieves propriety and regularity in the use of public funds.

## **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 Trust Governance Professional or The Trust HR & Business Director before accepting or offering any gifts or hospitality with a value of over £25.

#### **4.2 The Executive Headteacher / Head of School**

The Executive headteachers / Head of School is responsible for ensuring that staff are aware of and understand this policy, and that it is being implemented consistently.

They 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 Trust HR & Business Director, 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.

#### **4.3 The Trust HR & Business Director**

The Trust HR & Business Director 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/principal] are provided with information on gifts and hospitality received and given, as appropriate

They will also ensure, alongside the Executive Headteacher / Head of School, 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.

#### **4.4 The Trust Finance Manager**

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

### **5. Offer 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 Trust HR & Business Director or Executive Headteacher/ Head of School.

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, seek guidance as above.

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

If the Executive Headteacher/Head of School is the recipient, or intended recipient, of any offer of gifts or hospitality, they must inform the Chair of the board of trustees 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 may be treated as a disciplinary matter.

#### **5.1 Trust / school offers of gifts and hospitality given**

- Alcohol must not be purchased out of the school budget.
- Expense claims should be made to the [job title of relevant staff member] and receipts must always be enclosed.
- The Executive Headteacher or Trust HR & Business Director 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. Not to do so will be considered a disciplinary matter and will be dealt with under the school's disciplinary policy.

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

#### **8. Monitoring arrangements**

The gifts and hospitality register is monitored regularly by the Trust Finance Manager.

## Appendix A

### Gifts Register Template

Date	Name of recipient	Position	School	Description of Gift and or hospitality offered	Reason for acceptance	Gifting Person/ Organisation details	Value of gift	Approved by: