



Wessex
Learning Trust
We Learn Together!

Gifts and Hospitality Policy

Date approved by Trust Board: September 2022
Review Date: September 2025

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Gifts and Hospitality Policy

This policy will be reviewed by the Board of Trustees every three years.

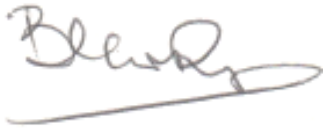
A handwritten signature in black ink that reads "Gavin Ball". The signature is written in a cursive style with a large, sweeping initial 'G'.

Signature:

Name: Mr Gavin Ball

Position: Chief Executive

Date: 01/09/22

A handwritten signature in black ink that reads "Brian Kirkup". The signature is written in a cursive style with a large, sweeping initial 'B' and a long horizontal flourish at the end.

Signature:

Name: Mr Brian Kirkup

Position: Chair of the Board

Date: 01/09/22

1. Statement of Intent

1.0 This policy aims to ensure that:

- The Trust's funds are used only in accordance with the law, its articles of association, its funding agreement and the latest Academy Trust Handbook (formerly 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.
- Members and Trustees fulfil their fiduciary duties.
- 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

2.1 This policy is based on the Academy Trust Handbook which states that academy trusts should have a policy and register 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.

3. Definitions

3.1 **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.

3.2 **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:

- 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 Director of Operations before accepting or offering any gifts or hospitality with a value of over £25.

4.2 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 Headteachers are responsible for ensuring that staff are aware of and understand this policy, and that it is being implemented consistently. Staff should sign to confirm that they have read and understood the policy. 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 to those outside the organisation. They will also ensure, alongside the Director of Operations and the Chief Executive that decisions on whether individuals or the Trust can accept gifts or hospitality with a value of over £25, or offer a gift or hospitality with a value of £25 or under are in line with this policy.

4.4 The Director of Operations and Chief Executive will ensure that:

- Academies and the Trust maintain 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.
- Headteachers are provided with information regarding gifts and hospitality and the requirements for recording them.
- Decisions on whether individuals or the Trust can accept gifts or hospitality with a value of over £25 are in line with this policy.
- Decisions on whether a gift is made of up to £25 are in line with this policy.

4.5 An individual at each Academy, for example the Operations Manager/Officer Finance Officer or PA to the Headteacher shall be appointed by the Headteacher to maintain the gifts and hospitality register on a day-to-day basis.

5. Acceptance of Gifts and Hospitality

5.1 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 Operations.

5.2 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 Operations.

5.3 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 Operations before accepting.

5.4 Gifts may be received from a student or the parent/s of a student provided the gift is of nominal value but below £25.

5.5 Staff attendance at sporting and cultural events when paid for by suppliers, potential suppliers or consultants is **not** normally acceptable. Where it is considered that there is a benefit to the Academy in a member of staff attending a sponsored event, the attendance should be formally approved by the Director of Operations/Chief Executive prior to attendance.

5.6 If the Chief Executive is the recipient, or intended recipient, of **any** offer of gifts or hospitality, they must inform the Chair of the Trust Board and record the offer on the central team gifts and hospitality register.

5.7 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.

6. Offers of Gifts and Hospitality

6.1 The Trust recognises that there may be circumstances when it is appropriate to provide a gift or hospitality to an individual including a staff member. However, the value of the gift must be reasonable and the reason must be documented. Overall the decision to award a gift or hospitality must have due regard to propriety and regularity in the use of public funds.

6.2 The decision to offer a gift will depend on individual circumstances but it may be appropriate to provide for example a gift to a member of staff leaving after many years of valuable service or to a member of staff in condolence or celebration of a notable event. Such gifts could include, for example a card, flowers, or chocolates. A gift card must not be purchased for any individual member of staff.

6.3 In the interests of safeguarding children and to prevent staff from being open to accusation of exerting undue influence, no member of staff is permitted to give a gift to a student at any time unless this “gift” relates to a pre-approved award scheme approved by the Headteacher. Any gift or hospitality provided by an Academy, such as a working lunch for visitors, must not be extravagant.

6.3 The maximum value for any hospitality or gift to an individual is **£25**. Alcohol must not be provided as a gift/hospitality if purchased out of the school funds (official and unofficial).

6.4 All gifts provided must be recorded in the gifts and hospitality register (see appendix 1) and must be authorised by the Headteacher or if from the Trust, the Chair of the Trust Board.

6.5 The following are examples that 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.
- Alcohol.
- Lavish or extravagant gifts or hospitality, even if they relate to activities the recipient undertakes in their own time.

This list is by no means exhaustive

7. Declining Gifts and Hospitality

7.1 Any Member, Trustee or staff member who is offered any of the unacceptable gifts or hospitality outlined 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 Director of Operations who

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.

7.2 Disciplinary action may be taken against anyone who fails to decline gifts or hospitality the Trust has deemed unacceptable.

7.3 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.



Gifts and Hospitality Register - (Insert School)
Academic Year (Insert Year)

Gifts & Hospitality Received					
Date	Name of Individual Receiving	Description of gift/hospitality and approximate value	Party Offering gift/hospitality	Accepted / Rejected	Approved by

Gifts & Hospitality Offered				
Date	Name of Individual Receiving	Description of gift/hospitality and approximate value	Reason for the gift/hospitality	Approved by

Note:

Please complete a separate register each academic year.

At the end of the financial year you will be asked to forward your register to the WLT Central Team as part of the Year End Process.

To be completed and signed by (Executive) Headteacher or Business/Operations Manager

Signature:		Print Name:		Date:	
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