

# Primary Learning Trust (PLT)

*...where everyone flourishes!*



## Gifts and Hospitality Policy

Primary Learning Trust  
Ryders Hayes School  
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WS3 4HX

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**Mission:** to educate all our primary children for life, inspired by expert professionals, in a place *where everyone flourishes!*

## Vision

- A family of schools, proud to be working together as one entity, in the right conditions for deep and purposeful **collaboration**
- To **belong** to a great place to learn, work and grow.
- To improve and sustain high educational standards across the Trust, through **evidence-informed** practice.
- To continuously improve teaching and learning, ensuring that every pupil has the best possible education.
- To hold trust on behalf of our children, achieving the best for and from our people, so that everyone can **flourish**.
- To empower our children and our people to create a better future.
- To advance the education system, as part of our civic duty, for the wider public benefit

## Values

- **Belonging:** where all our people feel connected, valued, trusted and fulfilled, with a shared purpose to achieve excellence, in a place of psychological safety.
- **Flourishing:** where all our people thrive and continue to grow through the development of their intellectual potential and live well, building strong relationships as well-rounded human beings.
- **Collaboration:** by design, to ensure that all our people are supported and openly share ideas and practice; that no school - no child - is left behind, building together the pipeline that develops the next generation of leaders, global citizens, influencers and innovators.
- **Evidence-informed:** conceptual models of quality and improvement that can be shared and embedded. Deliberate and intentional knowledge-building to create expertise through cultures and communities of improvement, using the active ingredients of professional development.

## **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 fulfill 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 compromise their personal judgment or integrity. This should include members, trustees, staff and/or any other representative of the trust. The handbook 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 within 7 working days, even if declined
- Must consult Naylah Khan, Chief Financial Operator, or the Head of School 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 Head of School**

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

The Head of School 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 and Operations, 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 Head of School is responsible for communicating the trust's rules and expectations about gift-giving to parents.

#### **4.4 The Director of Finance and Operations**

The Director of Finance and Operations 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 Head of School are provided with information on gifts and hospitality received and given, as appropriate

They will also ensure, alongside the 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.

### **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 under £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 Chief Financial Officer or 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, guidance must be sought from the Chief Financial Officer or Head of School.

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 Chief Financial Officer or Head of School before accepting.

If the Head of School is the recipient, or intended recipient, of any offer of gifts or hospitality, they must inform the CEO, and the CEO/Executive Teacher if a recipient should 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 will be treated as a staff disciplinary matter.

## **5.2 Offer of gifts and hospitality given**

Expenses for items purchased for the use of the Trust and its pupils must be submitted with an appropriate receipt and completed on an Expenses Claim Form. This will be approved by the Deputy Head of School before reimbursement will be made.

The school budget may be used to offer hospitality/gifts to staff, trustees or visitors to:

- recognise the service offered to the Academy on a voluntary basis.
- recognise the duration of service as an employee, value not exceeding £75 (see Service Recognition chart in Appendix 1, unless exceptional circumstances in which case this should be referred to the Chair of Trustees)
- gift to staff for immediate family bereavement, value not exceeding £30
- gift to staff recovering from operation value not exceeding £30

Gifts will be given in the form of online vouchers, or items not exceeding the above values.

Any gifts or hospitality provided by the trust, such as a working lunch for visitors, must not be extravagant.

Alcohol must not be purchased out of the Trust budget.

Expense claims should be made to the Chief Financial Officer and receipts must always be enclosed.

The Chief Financial Officer or Head of School must be consulted about any proposal to provide gifts or hospitality with a value of over £25 per person.

## **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.

If they feel it would not be appropriate for them to decline, they should refer the matter to the Chief Financial Officer or Head of School. The Chief Financial Officer or Head of School 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.

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. Communication and Monitoring arrangements**

This policy will be communicated with all staff initially through the staff briefing and shared by email.

The gifts and hospitality register is monitored regularly by the Chief Financial Officer

This policy and the associated gifts and hospitality register will be reviewed and approved annually by the Full Board of Trustees.

**Appendix 1 - Service Recognition Chart**

<b>Service Years</b>	<b>Gift Value</b>
<b>5 Years</b>	<b>£10.00</b>
<b>10 Years</b>	<b>£20.00</b>
<b>15 Years</b>	<b>£30.00</b>
<b>20 Years</b>	<b>£40.00</b>
<b>25 Years</b>	<b>£50.00</b>
<b>30 Years</b>	<b>£75.00</b>

**Please Note: Exceptional Circumstances will be referred to the Chair of Trustees for approval.**