



Triumph Learning Trust

Aspiration - Collaboration - Innovation

Gifts and Hospitality Policy

Policy Details

Policy Level	Trust
Document Approver	Trust Board
Document Status	Final
Applicable to	All Trust Employees
Review Frequency	Every 3 Years

Revision History

Revision	Date	Details	Approved by
0	28 January 2025	First Issue	PIC

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1. Introduction

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 and to avoid influencing education decisions made by the CEO, the CFO and or a Head Teacher.
- 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. Scope of Policy

This policy applies to all individuals working at all levels and grades, including Trustees and members of Local Accountability Boards (LAB). It applies to all staff including Headteachers, Senior Leadership Teams, teaching and non-teaching staff, consultants, contractors, trainees, seconded staff, homeworkers, casual workers and agency staff, volunteers, interns, agents, sponsors, or any other person associated with us, or any of our subsidiaries or their employees. Referred to generally as Staff in this policy.

Members, Trustees, Governors and Staff should ensure that they read, understand and comply with this policy and avoid any activity that might lead to, or suggest, a breach of this policy.

This policy does not form part of any employee's contract of employment, and it may be amended at any time. Any employee who breaches this policy will face disciplinary action, which could result in dismissal for gross misconduct. The Trust reserves its right to terminate its contractual relationship with other workers if they breach this policy.

3. Responsibilities

The Trust recognises it has a statutory obligation to adopt formal policies and establish workplace procedures for dealing with Gifts and Hospitality. The Trust recognises that Gifts and Hospitality rules and procedures promote good employment relations and is committed to dealing with matters in a fair and consistent way.

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 £40 (from an individual source) on the gifts and hospitality register within 7 working days, even if declined.
- Must consult the headteacher before accepting or offering any gifts or hospitality with a value of over £40 (from an individual source).

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.

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 School Operations Manager that decisions on whether individuals or the trust can accept or offer gifts or hospitality with a value of over £40 are in line with this policy. For pupils in the last year of primary or secondary schools there is an exception as parents may wish to recognise the impact the school has had on their child and as such are unable to continue to have influence over the school.

The School Operations Manager

The School Operations Manager will ensure that:

- Figures for transactions relating to gifts made by the school are disclosed in the trust's audited accounts, in accordance with the Academy Trust Handbook using the gifts register using this link: <https://forms.office.com/e/ggnDzukMRx>

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 can accept or offer gifts or hospitality with a value of over £40 (from an individual source) are in line with this policy.

4. 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. It 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.

5. 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.

6. Acceptable gifts and hospitality

Offer of gifts and hospitality received

- Members, trustees and staff can accept gifts and hospitality that have a value of up to £40 (from an individual source). These do not have to be pre-approved or recorded on the gifts and hospitality form.
- 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 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 headteacher
- Any gifts or hospitality offered with a value of over £40 (from an individual source) must be recorded on the gifts and hospitality form within 7 working days, even if declined. Any member, trustee or member of staff who is offered such gifts or hospitality must consult the headteacher before accepting.

Form <https://forms.office.com/e/ggnDzukMRx>

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

Offer of hospitality given

Any hospitality provided by the trust, such as a working lunch for visitors, must not be extravagant. A maximum value of £10 per head should be used as a guideline. Alcohol must not be purchased out of the school budget. Expense claims should be made to the School Operations Manager and receipts must always be enclosed. The headteacher must be consulted about any proposal to provide hospitality with a value over £10.

7. Unacceptable gifts and hospitality

The following must never be offered or accepted:

- Monetary gifts (excluding gift vouchers)
- 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.

8. 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 headteacher. The headteacher 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.

9. Monitoring arrangements

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

This policy will be reviewed every three years by the CEO and the CFO and approved by the Audit and Risk Committee.

10. How to raise a concern

Members, Trustees, Governors and Staff should notify their Line Manager, the Headteacher or the CFO if they believe or suspect that a conflict with this policy has occurred, or may occur in the future such as:

- If staff are offered something to gain a business advantage with the Trust, or a payment is required to secure an advantage.
- If the staff member is offered a bribe by a third party, they are asked to make one or suspect that there may be one in the future.

Concerns should be reported by following the procedure set out in the Whistleblowing Policy.

The Trust aims to encourage openness and will support anyone who raises genuine concerns under this policy. The Trust is committed to ensuring no one suffers any detrimental treatment as a result of raising concern. Detrimental treatment includes dismissal, disciplinary action, threats or other unfavourable treatment connected with raising a concern. If staff believe that they have suffered any such treatment, they should inform their

Line Manager. If the matter is not remedied, and the individual is an employee, they should raise it formally using the Grievance Procedure.