

We are an **ambitious** and **inclusive** Trust of schools  
strengthening communities through **excellent** education.



# Gifts and Hospitality Policy

Responsibility for approval: Finance and Resources Committee  
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## 1.0 Policy Statement

- 1.1 We are an ambitious and inclusive Trust of schools strengthening our communities through excellent education. Our success is underpinned by providing the highest standard of service to all our students and parents, and by caring for the wellbeing of our employees.
- 1.2 As a general guideline, business gifts and hospitality should not be accepted, except as provided for below. This ensures the Trust demonstrates propriety and regularity in the use of public funds and protects you from misunderstanding or criticism.

## 2.0 Scope and purpose

- 2.1 The policy applies to all of us: Trustees, Governors and all colleagues across the business.
- 2.2 Inevitably some issues will affect trustees, governors and senior post holders more than others and breaches of the policy may be regarded more seriously for those in such positions. The principle of integrity requires that we do not place ourselves under an obligation that might influence, or be perceived to influence, the conduct of our duties. This means that the receipt of hospitality and gifts must be subject to clear restrictions.

## 3.0 Definition

- 3.1 For the purpose of this document, The Ted Wragg Multi Academy Trust is referred to as the **Trust**.

## 4.0 General principles

- 4.1 The intention of the policy is to ensure that the Trust can demonstrate that no undue influence has been applied or could be said to have been applied by any supplier or anyone else dealing with the Trust. Any consideration of whether or not the principles of this policy have been breached will be determined by reference to this provision. The policy also aims to comply with the Academy Trust Handbook, which states:
  - 4.2 **'Academy trusts 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'**.
- 4.3 You must not use your authority or office for personal gain and must seek to uphold and enhance the standing of the Trust by:
  - Maintaining an unimpeachable standard of honesty and integrity in all business relationships.
  - Complying with the letter and spirit of the law, and contractual obligations, rejecting any business practice that might be deemed improper.
  - At all times acting to maintain the interests and good reputation of the Trust.
- 4.4 Any employee or office holder who becomes aware of a breach of policy must report this immediately to his or her manager (and/or the Director of Finance or Assistant Director) who will instigate investigations, as necessary.
- 4.5 Any personal interest that may impinge or might reasonably be deemed by others to impinge on your impartiality or conflict with the duty owed to the Trust in any matter relevant to your duties (such as conflicting business interests) should be declared in writing. Any member of staff who is aware of any business dealings conferring personal gain or involving relatives or associates of members of staff must supply details of such transactions for entry into the Register of Business Interests.

## 5.0 Gifts

- 5.1 Employees, and others connected with the Trust, are permitted to accept gifts, rewards, or benefits from members of the public or organisations the Trust has official contacts with only where they are isolated gifts of a trivial character (such as diaries or calendars) or 'one-off' token gifts from parents. Gifts should not therefore be accepted if they appear to be disproportionately generous or could be construed as an inducement to affect a business decision. Personal gifts from employees to pupils are inappropriate and could be misinterpreted and may lead to disciplinary action.
- 5.2 The following general rules apply and must guide decisions on receipt of gifts and hospitality as an employee of the Trust:
- To accept gifts should be the exception. You may accept small 'thank you' gifts of a reasonable value, such as a diary, a coffee mug or bunch of flowers, not over £30 in value. You should notify the Director or Assistant Director of Finance of any gift or hospitality over this value for entry in the Gifts and Hospitality Register.
  - Always say "no" if you think the giver has an ulterior motive. Be sensitive to the possibility that the giver may think that even small gifts or simple hospitality will elicit a more prompt service or preferential treatment.
  - Never accept a gift or hospitality from anyone who is, or may be in the foreseeable future, tendering for any contract with the Trust, seeking employment with the Trust or is in dispute with the Trust, even if you are not directly involved in that service area.
  - Where items purchased for the Trust include a 'free gift', such a gift should either be used for Trust business or handed to the relevant 'Head of Business Support' to be used for charity raffles.
  - If you are in doubt about the acceptability of any gift or offer of hospitality, it is your responsibility to consult the Director/Assistant Director of Finance or Headteacher.

## 6.0 Making of gifts

- 6.1 When making gifts, the Trust must ensure the value is reasonable (i.e. not excessive or disproportionate), is within its scheme of delegation, the decision is documented, and achieves propriety and regularity in the use of public funds.
- 6.2 For most purposes, a limit of £25 will be sufficient. This may be varied in exceptional circumstances with appropriate ratification (Executive / Trustee agreement as appropriate to the circumstance).
- 6.3 To achieve propriety in the use of public funds, gifts for members of staff who are leaving or have a personal celebration should only be bought with voluntary contributions from colleagues.
- 6.4 Academies may, at the Headteacher's discretion, use funds responsibly for the purpose of staff wellbeing and recognition, e.g. thank you cards for recognition or flowers to recognise a bereavement. The value should be reasonable and not exceed £35 (i.e. a modest bunch of flowers).
- 6.5 Alcohol must never be purchased under any circumstances.

## 7.0 Hospitality

- 7.1 A gauge of what is acceptable in terms of hospitality is whether this Trust would offer a similar level of hospitality in similar circumstances.
- Occasional working lunches with customers, providers or partners are generally acceptable as a way of doing business, provided they are not to an unreasonable level or cost.
  - Invitations to corporate hospitality events must each be judged on their merit. Provided the general rules have been considered, it may be acceptable to join other company/organisation guests at:
    - sponsored cultural and sporting events, or other public performances, as a representative of the Trust.
    - special events or celebrations.
- But, consider the number of these events, and always take into consideration what public perception is likely to be if they knew you were attending.

- Acceptability depends on the appropriateness of the invitations, in terms of the level of hospitality, the frequency and the status of the invited employee. In all such cases the Headteacher or Trust Line Manager must be consulted.
- Paid holidays or concessionary travel rates are not acceptable. Neither are offers of hotel accommodation nor the use of company villas/apartments.
- If you are visiting a company to view equipment that the Trust is considering buying, you should ensure that expenses of the trip are paid by the Trust. Acceptance of refreshments and/or a working lunch may be acceptable, but care must be taken to ensure that the Trust's purchasing and/or tender procedures are not compromised.
- Acceptance of sponsored hospitality that is built into the official programme of conferences and seminars related to your work are acceptable.
- Offers to speak at corporate dinners and social gatherings, or events organised by, for example, a professional body, where there is a genuine need to impart information or represent the Trust must be agreed in advance with a Headteacher or Trust Line Manager. Where your spouse or partner is included in the invitation, and approval has been given for you to attend, it will be acceptable for your spouse or partner to attend as well, but if expenses are incurred, these will be met personally.
- Any invitation you accept should be made to you in your professional/working capacity as a representative of the Trust.

## 8.0 Legal Framework

- 8.1 This policy will be reviewed by Finance and Resources Committee on a two-year cycle.