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PARKWOOD HALL CO-OPERATIVE ACADEMY

Parkwood Hall Co-operative Academy

"Growth through Personal and Social Learning"

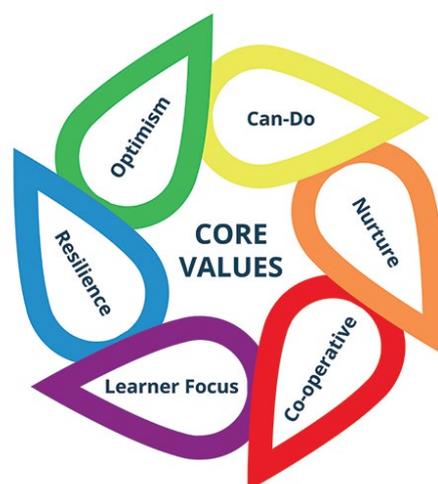
Statutory Policy File

GIFTS AND HOSPITALITY

Index No: 27 v1.0

Parkwood Hall Co-operative Academy is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment'

Our Core Values



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GIFTS AND HOSPITALITY POLICY

1 INTRODUCTION

Parkwood Hall is a Co-operative Academy and we have adopted the values of the co-operative movement to assist us as we govern the school. We have also developed values for learning and teaching that inspire our students and staff alike.

Our co-operative values are *self help, self responsibility, democracy, equality, equity, solidarity, honesty, openness, social responsibility and caring for others*. These are the ways in which we do things at our school and they sit at the heart of all our policy development.

In this policy the following values are particularly relevant:

- Honesty and openness – it is our duty to be open and transparent in our dealings with the public; including parents, families, suppliers and contractors. We aim to operate to the highest levels of probity and freedom from accusations of corrupt or underhand practice.
- Self-responsibility – each employee and trustee must monitor their own behaviour and that of their colleagues, to ensure that the highest standards of best practice are upheld, and to raise concerns (see the Whistleblowing Policy) without fear or favour.
- Social responsibility – the primary purpose of the Trust is to meet the educational, physical and social needs of the students and to provide appropriate support to their families. We must ensure that all our activities are consistent with our primary purpose.

2 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

3 LEGISLATION AND GUIDANCE

This policy is based on the [ACADEMIES FINANCIAL 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.

This policy also complies with our funding agreement and articles of association.

4 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.

5 ROLES AND RESPONSIBILITIES

5.1 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 consult the **[headteacher/principal]** before accepting or offering any gifts or hospitality with a value of [over £10]

5.2 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.

The **[headteacher/principal]**

The **[headteacher/principal]** is responsible for ensuring that staff are aware of and understand this policy, and that it is being implemented consistently.

The **[headteacher/principal]** 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 [Academy Business Manager], 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.

5.3 The [Academy Business Manager]

The [Academy Business Manager] 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 [headteacher/principal], that decisions on whether individuals or the trust can accept or offer gifts or hospitality with a value of [over £10] are in line with this policy.

5.4 The [academy's Finance Officer]

The [academy's Finance Officer] is responsible for maintaining the gifts and hospitality register on a day-to-day basis.

5.5 Parents

- Explain that you do not wish to discourage all gift-giving, and that small tokens of gratitude are always appreciated
- Provide guidance on the appropriate value of gifts and circumstances when they may be offered, or explain that the trust prevents teachers and other staff from accepting gifts worth over a certain amount

6 ACCEPTABLE GIFTS AND HOSPITALITY

6.1 Offers of gifts and hospitality received

Members, trustees and staff can accept gifts and hospitality that have a value of [up to £10]. 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 [headteacher/principal].

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/principal].

Any gifts or hospitality offered with a value of [over £10] 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 [headteacher/principal] before accepting.

If the [headteacher/principal] is the recipient, or intended recipient, of any offer of gifts or hospitality [with a value of more than £10], 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 will be treated as a staff disciplinary matter.

6.2 Offers of gifts and hospitality given

- Define circumstances when using the school budget to offer particular hospitality to staff or visitors is acceptable
- Explain your approach to giving gifts to staff
- Provide more detail about the types of expenses that staff can and cannot claim when working off-site (such as when on residential training courses)
- Set out more information on your process for claiming expenses

Any gifts or 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's main delegated budget. It can be purchased out of the Voluntary Fund budget, for purposes connected with school social functions and fund-raising.

Expense claims should be made to the [Finance Officer] and receipts must always be enclosed.

The [headteacher/principal] must be consulted about any proposal to provide gifts or hospitality with a value of [over £10].

7 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 [you may also wish to define what you class as a lavish or extravagant gift]

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/principal]. The [headteacher/principal] 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 [Academy Business Manager]. This policy will be reviewed every [2 years] by the [headteacher/principal] and will be approved by the [Finance and General Purposes committee].

10 LINKS WITH OTHER POLICIES

This gifts and hospitality policy is linked to the:

- Staff code of conduct (Index No. 20)
- Staff disciplinary procedures
- Accounting policy

APPENDIX 1. GIFTS AND HOSPITALITY REGISTER

Date	Name	Description of gift/hospitality and approximate value	Party offering gift/hospitality	Accepted/rejected	Approved by

APPROVAL

This Policy was written for Parkwood Hall Co-operative Academy and will be reviewed by the Finance & General Purposes Committee and approved by the Governing Body on a 3 year cycle.

Date Policy Reviewed:	27/6/2018
Date of Next Review:	27/6/2021
Signature of Governor: <i>(for statutory policies only)</i>	Signature of Principal:
Date:	Date:

Version and Date		Action/Notes
1.0	27-6-18	Creation of document.