

Pope Francis Multi Academy Trust

GIFTS & HOSPITALITY POLICY

Presented & Approved by Trust Board	Thursday 11th March 2021
Signed by Chair of Trust Board	
Name of Chair of Trust Board	Fr Michael Fitzsimons
Date	Thursday 11th March 2021
Version	1
Date of Review	March 2023

Summary

As a general guideline, business gifts and hospitality should not be accepted by any member of staff, except as provided for below.

The intention of the policy is to ensure that The Pope Francis Academy 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.

The Trust should be able to show that all decisions are reached on the basis of value for money or such other reasonable and relevant considerations, and for no other reason.

Any consideration of whether or not the principles of this policy have been breached will be determined by reference to this provision.

As this policy is closely linked to the Bribery Act 2010, key parts of the Act have been included in this policy as an appendix (See Appendix 1 –The Bribery Act essentials). Implications of non-adherence to the Bribery Act 2010 are detailed in the attachment (note that bribery is a criminal offence).

Any breach of this policy could lead to disciplinary action and may constitute gross misconduct.

General Principles

Employees shall not use their authority or office for personal gain and shall seek to uphold and enhance the standing of the Trust by:

1. Maintaining an unimpeachable standard of honesty and integrity in all their business relationships.
2. Complying with the letter and spirit of the law, and contractual obligations, rejecting any business practice that might be deemed improper.
3. At all times in their business relationships acting to maintain the interests and good reputation of the Trust.
4. Any employee who becomes aware of a breach of policy must report this immediately to his or her manager who will instigate investigations as necessary.
5. Any personal interest that may impinge or might reasonably be deemed by others to impinge on an employee's impartiality or conflict with the duty owed to the Trust in any matter relevant to an employee's duties (such as conflicting business interests) should be declared by the employee 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.
6. Employees 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). 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.
7. Where purchased items on behalf of the Trust include a "free gift", such gifts should be either used for Trust business or handed to the Trust to be used at charity raffles etc, and not for personal use.

8. In relation to conventional hospitality (lunches, outings, tickets for events etc.) provided that it is normal and reasonable in the circumstances they may be accepted. Such invitations should not be accepted where there is no reasonable business justification for doing so, where an invitation is disproportionately generous, or where the invitation could be seen as an inducement to affect a business decision.
9. Any hospitality other than of a nominal value (up to £50) or facilities provided during the normal course of business should be reported for an entry in the Register of Business Interests. Guidance on what level of hospitality is acceptable from a third party follow the general rules below and must guide decisions on receipt of gifts and hospitality as an employee of the Trust:
 - a. To accept gifts should be the exception. Small ‘thank you’ gifts of token value, such as a diary, a coffee mug or bunch of flowers, not over £50 in value are acceptable. The school business manager must be notified of any gift or hospitality over this value for entry in the Register of Gifts and Hospitality.
 - b. If it is thought that the giver has an ulterior motive the gift must always be rejected. Sensitivity must be applied to the possibility that the giver may think that even small gifts or simple hospitality will elicit a more prompt service or preferential treatment.
 - c. A gift or hospitality must be rejected 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 the potential recipient is not directly involved in that service area.
 - d. Where items purchased for the Trust include a ‘free gift’, such a gift should either be used for Trust business or handed to the School Business Manager to be used for charity raffles.
 - e. If in doubt about the acceptability of any gift or offer of hospitality the school business manager or Headteacher must be consulted. A gauge of what is acceptable in terms of hospitality is whether the Trust would offer a similar level of hospitality in similar circumstances.
 - f. 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.
 - g. Invitations to corporate hospitality events must each be judged on their merit. Provided the general rules have been taken into account, it may be acceptable to join other company/organisation guests at:
 - i. sponsored cultural and sporting events, or other public performances, as a representative of the Trust;
 - ii. special events or celebrations. But, consider the number of these events, and always take into consideration what public perception is likely to be if attending.
 - h. 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 the Chair of Trustees (as appropriate) must be consulted.
 - i. Paid holidays or concessionary travel rates are not acceptable. Neither are offers of hotel accommodation nor the use of company villas/apartments.

- j. 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 Trusts purchasing and/or tender procedures are not compromised.
- k. Acceptance of sponsored hospitality that is built into the official programme of conferences and seminars related to your work are acceptable.
- l. 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 the CEO (as appropriate). Where a spouse or partner is included in the invitation, and approval has been given for attendance, it will be acceptable for a spouse or partner to attend as well, but if expenses are incurred, these will be met personally.
- m. Any invitation accepted should be made in your professional/working capacity as a representative of the Trust.

Guidance on what level of hospitality is acceptable provided by the school to staff and third parties

The general rules described above must apply and must guide decisions on providing gifts and hospitality to employees and third parties by all within the Trust.

Acceptable hospitality to staff includes staff celebration and events e.g. Christmas, end of year, retirement of a long serving member of staff or governor/trustee, amongst others; and may be in the form of meals and soft drinks and small tokens of appreciation.e.g. flowers, trophy, it however must not include alcohol.

The cost of such celebrations will only be funded by the academies unrestricted fund up to a maximum of £1,000 per school per annum.

Staff subsistence, including refreshments on staff training days are funded from the academies relevant restricted funds.

This policy will be reviewed by the Finance, Audit & Risk Committee on a 2-yearly cycle.