



Gifts And Hospitality Policy

Mercian Educational Trust

Author:- SCBird@metacademies.org.uk

**Ratifying
Group:-** Mercian
Educational
Trust

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AMENDMENTS TO POLICY

<i>Item</i>	<i>Location</i>	<i>Date of change</i>	<i>By</i>
<i>Format Update</i>	<i>Throughout</i>	<i>17/09/2025</i>	<i>D Lawday</i>

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Mission:

"Empowering pupils and employees to develop a range of diverse skills to thrive in an evolving world through our family of distinctive schools. "

Trust Values

Empowering our community to develop a range of diverse skills to thrive in an evolving world through our family of distinctive schools



We are prepared;
our staff, equip our
pupils for a
successful future.



We are empowered;
we work together to
encourage each
other's unique
strengths and
ambitions.



We thrive in a safe
environment which
encourages our love
of learning.

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 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

2. Legislation and guidance

This policy is based 5.31.within 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.

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 **greater than £25** on the gifts and hospitality register (see appendix 1) within 7 working days, even if declined
- ✳ Must consult the Chief Financial Officer or Headteacher before accepting or offering any gifts or hospitality with a value of **greater than £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 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 Chief Financial Officer, that decisions on whether individuals or the trust can accept or offer gifts or hospitality with a value of **greater than £25** are in line with this policy.

4.4. The Chief Financial Officer

The Chief Financial Officer (CFO) 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 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 or the trust can accept or offer gifts or hospitality with a value of **greater than £25** are in line with this policy.

4.5. The Senior Administrator

The Senior Administrator is responsible for maintaining the gifts and hospitality register on a day-to-day basis.

4.6. Parents

In order to avoid reputational damage or professional relationships with parents' schools must be clear in their communication to explain restrictions on giving gifts to teacher. A template to assist schools in this aim can be viewed within Appendix 2

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 Senior Administrator **up to £25**. These do not have to be pre-approved or recorded on the gifts and hospitality register.

[Gifts and Hospitality register Link](#)

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 CFO or 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 CFO or Headteacher.

Any gifts or hospitality offered with a value of **greater than £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 CFO or Headteacher before accepting.

If the Headteacher is the recipient, or intended recipient, of **greater than £25** offer of gifts or hospitality, they must inform their Chair of the Delegated Governance Committee and record the offer on the gifts and hospitality register.

If the CFO is the recipient, or intended recipient, of **greater than £25** offer of gifts or hospitality, they must inform their Chair 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

Any gifts or hospitality provided by the trust, such as a working lunch for visitors, must not be extravagant. A maximum value of **£25 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 **Senior Administrator** and receipts must always be enclosed.

The **CFO** or **Headteacher** must be consulted about any proposal to provide gifts or hospitality with a value of **over £25**.

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 Headteacher or CFO. The Headteacher or CFO 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. Monitoring arrangements

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

This policy will be reviewed every two years by the Business and Finance Team and approved by the Board of Trustees.

9. Links with other policies

This gifts and hospitality policy is linked to the:

- ✖ Staff code of conduct
- ✖ Staff disciplinary procedures
- ✖ Accounting policy

5.2.1. Appendix 1: Gifts and Hospitality Register – Paper Copy

DATE	NAME	DESCRIPTION OF GIFT/HOSPITALITY AND APPROXIMATE VALUE	PARTY OFFERING GIFT/HOSPITALITY	ACCEPTED/REJECTED	APPROVED BY

Please Note: - This version should only be used as a back-up should the online version of [gifts and hospitality register](#) be inaccessible

5.2.2. Appendix 2: Gifts and hospitality – Information for parents

Information about parental gifts to school staff



Within all MET schools we endeavour to be transparent and fair to ensure all are treated with equality and respect.

At particular points in the school year, we recognise that some parents (and children) wish to show their gratitude to staff who have helped them through the year. MET staff **do not expect** presents. There should be no expectation (implicit or explicit) on parents / carers to do so; all staff would be dismayed to think that families feel any pressure to do so.

However, in recognition that some families will want to give small gifts to staff we would like to make you aware of the following guidelines as to avoid causing offence or misinterpretation.

Please remember that our staff are not permitted to:

- 🚫 Accept any gifts/hospitality over the value of £25
- 🚫 Accept any cash rewards
- 🚫 Accept home baked / cooked items that may contain nuts

We would like to take this opportunity to wish you and your families well and thank you for your continued support of your school.

**5.2.3. Appendix 2b: Gifts and hospitality – Parent Information – COVID
Amendment**

Information about parental gifts to school staff

Changes due to COVID-19



Within all MET schools we endeavour to be transparent and fair to ensure all are treated with equality and respect.

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Changes due to coronavirus

To be on the safe side, and to be compliant with our current COVID precautions, please could we request that those bringing gifts into school use the following precautions:

- ✖ Any gifts are brought in **1 week before the end of term**, which is [insert date]
- ✖ Gifts are clearly marked with the staff member's name
- ✖ Gifts for the class teacher are placed in the designated area within the class. Gifts will remain in this space until the last day of term.
- ✖ Gifts for other staff members are left in a sanitised area [specify where this will be] for 72 hours before distributing them to staff.
- ✖ We cannot accept homemade food whilst additional restrictions are in place.
- ✖ Please **do not send in gifts** if you or your child are self-isolating, have symptoms of coronavirus or have tested positive. If your child wants to write a card, they can instead send an email or e-card to [insert contact details], and we will make sure this reaches their teacher(s).

We would like to take this opportunity to wish you and your families well and thank you for your continued support of your school.