

Gifts & Hospitality Policy



Approved on:	Insert Date
Approved by:	Board of Trustees
Last reviewed on:	Insert Date
Reviewed by:	Angelina Morlacci
Next review due by:	Insert Date

Summary of Changes

[Use the table below to insert any changes made to the document since the last approval. Please delete text as appropriate]

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1. Purpose and Scope

The Beckmead Trust is committed to the highest standards of integrity, transparency, and accountability. As a custodian of public funds, the Trust must ensure that all decisions are made with impartiality and without external influence.

This policy is designed to:

- Prevent actual or perceived conflicts of interest, bribery, or corruption.
- Ensure compliance with the **Academy Trust Handbook** and the **Bribery Act 2010**, and **HMRC Trivial Benefit** guidelines.
- Protect staff and Trustees from accusations of professional impropriety.

This policy applies to all employees, Trustees, Governors, Members and contractors working on behalf of the Trust.

2. Gifts and Hospitality Received (External to Staff)

Staff and Trustees must declare any gift or hospitality offered by an external party that meets the following criteria for entry into the formal Register:

Category	Value/Detail	Action Required
Small Token Gift	Estimated value Under £25 (e.g. flowers/chocolates from parents)	No declaration needed.
Declarable Gift	Estimated value of £25 or more .	Must declare to Central Finance.
Contractor Gift	Any value if from a supplier or party bidding for work.	Must declare and usually decline.
Collective Gift	Under £100 (e.g. from a whole class or group).	No declaration needed.
Collective Gift	£100 or more (from a whole class or group).	Must declare to Central Finance.
Declined Items	Any value, if deemed inappropriate or exceeding limits.	Must declare as "Declined."

3. Gifts Given by the Trust (Goodwill)

The Trust may, in exceptional circumstances, use public funds to provide tokens of goodwill to staff (e.g., for retirement, long service, or significant welfare issues).

- **Approval:** All goodwill gifts must be approved by the CEO (Accounting Officer) or CFO.
- **Thresholds:** Gifts should be of "nominal" value (typically under £50) to align with HMRC "Trivial Benefit" rules and ensure the proportionate use of public funds.
- **Recording:** All such gifts must be recorded on the Trust-Funded Goodwill Register to provide a clear audit trail of expenditure.

4. Unacceptable Gifts and Hospitality

The following are strictly prohibited and must be declined in all circumstances:

- **Monetary Gifts:** Cash, cheques, or personal gift vouchers.
- **Connected Parties:** Gifts offered to family members, partners, or close friends of Trustees, Members or staff.
- **Procurement Periods:** Gifts from potential suppliers during a tender window or active procurement process.
- **Extravagance:** Any lavish or extravagant hospitality (e.g. sporting event tickets, luxury meals), regardless of whether it relates to activities undertaken in the recipient's own time.

5. Approval and Reporting Process

To ensure an accurate audit trail, the Trust follows a centralized recording process:

- **Disclosure:** Staff must report the offer or receipt of a gift to their Head of School and the Regional Finance Lead (RFL) within 15 working days.
- **Recording:** The RFL will forward details to the Central Finance Team, who will record the entry in the Master Register.

- Verification: The CFO or Accounting Officer will review and sign off the entries monthly.

6. Governance and Monitoring

Nil Returns: If no gifts are recorded within a school term, a "Nil Return" will be logged to confirm the register is active.

Board Oversight: The Register will be presented to the Board of Trustees annually for formal review.

Appendix A

Register Format

- Ref # (e.g., 2025-001)
- Date Received/Offered
- Date Reported
- Recipient Name & Role
- School/Location
- Description of Gift & Estimated Value
- Donor Details
- Status (Accepted / Declined / Donated to Charity)
- CFO/AO Sign-off (Name & Date)

Use "Heading 1" for policy Subheadings

Insert "Normal text" for your policy content