LeavePlus
The leave that moves with you

Gifts, Benefits and Hospitality Policy

GOVERNANCE POLICY

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1. ABOUT THIS POLICY

1.1 Purpose

This Policy sets out LeavePlus' policy on:

- Responding to offers of gifts, benefits and hospitality; and
- Providing gifts, benefits and hospitality.

This Policy is intended to support team members to avoid conflicts of interest and to promote trust in the integrity of LeavePlus as the manager of the Construction Industry Portable Long Service Leave Fund (**Fund**).

1.2 Scope

This Policy applies to all LeavePlus Directors (when acting in that capacity), Executives, employees, contractors, consultants and any individuals or groups undertaking activity for or on behalf of LeavePlus (**LeavePlus Directors and Employees**).

1.3 Ownership and further information

The Company Secretary is responsible for developing, communicating, and implementing this Policy.

1.4 Review and approval

This Policy will be reviewed biennial and approved by the Board.

Version	Policy Owner	Reviewer	Comments	Approved		Next review date
				By	Date	
3.0	Company Secretary	Chief Legal & Compliance Officer	Biennial update including updates to titles, references & minor wording.	Board	19/8/25	Aug-27
2.2	Company Secretary	Company Secretary	Update to new LeavePlus format	NA	NA	NA
2.1	Company Secretary	ARC Committee	Minor layout updates	Board	9/8/23	Aug-25
2.0	Company Secretary	ARC Committee	Additional principles-based descriptions and clarity on acceptance/rejection	Board	9/8/22	Aug-23
1.0	Company Secretary	ARC Committee	Updated into new policy format.	Board	Mar-20	Jan-21

2. GUIDING PRINCIPLES

This Policy has been developed in accordance with best practice approach for the management of gifts, benefits and hospitality.

LeavePlus is committed to and will uphold the following principles in applying this Policy:

Impartiality: LeavePlus Directors and Employees have a duty to place the interests of LeavePlus and the Fund above their private interests when carrying out their duties. They will not accept gifts, benefits or hospitality that could raise a reasonable perception of, or actual, bias or preferential treatment. LeavePlus Directors and Employees do not accept offers from those about whom they are likely to make business decisions. Soliciting personal gifts, benefits or hospitality is strictly prohibited under any circumstance.

Accountability: LeavePlus Directors and Employees are accountable for:

- declaring all non-token offers of gifts, benefits and hospitality;
- declining non-token offers of gifts, benefits and hospitality, or where an exception applies under this Policy, seeking approval to accept the offer; and
- the responsible provision of gifts, benefits and hospitality.

LeavePlus Directors and Employees with direct reports are accountable for overseeing management of their direct reports' acceptance or refusal of non-token gifts, benefits and hospitality, modelling good practice and promoting awareness of gifts, benefits and hospitality policies and processes.

Integrity: LeavePlus Directors and Employees strive to promote trust in LeavePlus as manager of the Fund through providing or responding to offers of gifts, benefits and hospitality in a manner that is consistent with member and stakeholder expectations. LeavePlus Directors and Employees will refuse any offer that may lead to an actual, perceived or potential conflict of interest. LeavePlus Directors and Employees must not require or request any additional rewards for performing their duties. Under no circumstances are bribes or offers of cash to be accepted.

Risk-based approach: LeavePlus, through its policies, processes and through the Audit, Risk and Compliance Committee, will ensure gifts, benefits and hospitality risks are appropriately assessed and managed. LeavePlus Directors and Employees with direct reports will ensure they are aware of the risks inherent in their team's work and functions and monitor the risks to which their direct reports are exposed.

3. ROLES AND RESPONSIBILITIES

Board	Responsible for approving this Policy
Company Secretary	The owner of this Policy. Responsible for developing, communicating, and reviewing the Policy to ensure ongoing relevance to business needs and strategic goals. Part of the review process includes assessing feedback from team members and compliance with legislation.
Board Directors	Responsible for complying with this Policy and with any additional legal duties relating to conflicts of interest. This includes the duties under the Corporations Act: • To act in good faith in the best interests of LeavePlus • To not improperly use their position to gain an advantage for themselves or someone else or to cause detriment to LeavePlus It also includes acting in accordance with the fiduciary duties of LeavePlus as trustee of the Fund, which include the duty to act in the best interests of the beneficiaries of the Fund. In respect to any conflict of interest, each Board Director has an obligation to give priority to the interests of LeavePlus and to the beneficiaries of the Fund and not to their own private interests.

Executive and Managers	Responsible for ensuring that: • their staff are aware of this Policy and • any breaches of this Policy that come to their attention are addressed in accordance with the Performance, Behaviour and Discipline Policy.
General Manager People & Culture	Responsible for ensuring that: • All LeavePlus Directors and Employees receive a copy of this Policy during the induction process; • The Policy is easily accessible by all LeavePlus Directors and Employees; • LeavePlus Directors and Employees are reminded of this Policy at high-risk times of the year (e.g. Christmas season); and • LeavePlus Directors and Employees are notified of all changes to this Policy.
LeavePlus Directors and Employees	All LeavePlus Directors and Employees must comply with this Policy. LeavePlus Directors and Employees must address any queries to the Company Secretary and the 'Legal and Compliance team' for clarification of or assistance for, identifying, managing, and reporting gifts, benefits or hospitality.

4. KEY TERMS

4.1 Business associate

An individual or body that LeavePlus has, or plans to establish, some form of business relationship with, or who may seek commercial or other advantage by offering gifts, benefits or hospitality.

4.2 Benefits

Benefits include preferential treatment, privileged access, favours or other advantage offered to an individual. They may include invitations to sporting, cultural or social events, access to discounts and loyalty programs and promises of a new job.

The value of benefits may be difficult to define in dollars, but as they are valued by the individual, they may be used to influence the individual's behaviour.

4.3 Conflict of interest

Conflicts may be:

Actual: There is a real conflict between an individual's public duties and private interests.

Potential: An individual has private interests that could conflict with their public duties. This refers to circumstances where it is foreseeable that a conflict may arise in future and steps should be taken now to mitigate that future risk.

Perceived: The public or a third party could reasonably form the view that an individual's private interests could improperly influence their decisions or actions, now or in the future.

4.4 Gifts

Gifts are free or discounted items or services and any item or service that would generally be seen by the public as a gift. These include items of high value (e.g., artwork, jewellery, or expensive pens), low value (e.g., small bunch of flowers), consumables (e.g., chocolates) and services (e.g., painting and repairs).

Gifts obtained by either a 'door prize' should be treated in the same way as other gifts. If the potential prize is of non-token value or where accepting the prize could create a conflict of interest for the individual or otherwise bring LeavePlus into disrepute, the individual should not participate in or should refuse the door prize.

4.5 Hospitality

Hospitality is the friendly reception and entertainment of guests. Hospitality may range from light refreshments after a business meeting to expensive restaurant meals, invitations to conferences and seminars, and sponsored travel and accommodation.

4.6 Legitimate business benefit

A gift, benefit or hospitality may have a legitimate business benefit where it supports, furthers or promotes the legitimate interests of LeavePlus.

This will depend on a several factors including the role of the individual to whom the offer is made, the nature of the offer, and the other persons involved in the event.

For example, there may be a legitimate business benefit to LeavePlus for the Chief Executive Officer to accept an invitation to attend a sporting event or business lunch at which industry stakeholders will be present so that they can use the event to promote awareness of LeavePlus. In contrast, there may be little legitimate business benefit in a member of the Legal team attending a fashion show at the invitation of a company that has no connection with the construction industry or LeavePlus.

4.7 Token offer

A token offer is a gift, benefit or hospitality that is of inconsequential or trivial value to both the person making the offer and the recipient. It may include promotional items such as pens and note pads, and modest hospitality that would be considered a basic courtesy, such as light refreshments during a meeting. Token offers cannot be worth more than $50.

This does not apply to offers to attend training or education events, in which case it cannot be worth more than $250. For example, where an employee receives an offer to attend a legal update seminar offered by a law firm to clients of the law firm.

4.8 Non-token offer

A non-token offer is a gift, benefit or hospitality that is, or may be perceived to be by the recipient, the person making the offer or by the wider community, of more than inconsequential value. All offers worth more than $50 are non-token offers and must be declared (except for specific training or education offers, as defined under 'token offer').

5. MANAGING OFFERS OF GIFTS, BENEFITS & HOSPITALITY TO LEAVEPLUS DIRECTORS AND EMPLOYEES

This section sets out the process for accepting, declining and recording offers of gifts, benefits and hospitality. Any exceptions to this process must have the prior written approval of:

- the CEO (unless another approver is listed below)
- the Chair of the Board (for Board Directors and the CEO,)
- the Chair of the Risk, Audit and Compliance Committee (for the Chair of the Board)

5.1 Conflicts of interest and reputational risks

When deciding whether to accept an offer, LeavePlus Directors and Employees should first consider if the offer could be perceived as influencing them in performing their duties or lead to reputational damage. The more valuable the offer, the more likely that a conflict of interest or reputational risk exists.

Figure 1. GIFT test

G	Giver	**Who is providing the gift, benefit or hospitality and what is their relationship to me?** Does my role require me to select suppliers, make compliance decisions or recommend investments in the Fund? Could the person or organisation benefit from a decision I make?
I	Influence	**Are they seeking to gain an advantage or influence my decisions or actions?** Has the gift, benefit or hospitality been offered to me publicly or privately? Is it a courtesy or a token of appreciation or a valuable non-token offer? Does its timing coincide with a decision I am about to make?
F	Favour	**Are they seeking a favour in return for the gift, benefit or hospitality?** Has the gift, benefit or hospitality been offered honestly? Has the person or organisation made several offers over the last 12 months? Would accepting it create an obligation to return a favour?
T	Trust	**Would accepting the gift, benefit or hospitality diminish trust in LeavePlus or the Fund?** How would members and other stakeholders acceptance of this gift, benefit or hospitality? What would my colleagues, family, friends, or associates think?

5.2 Requirements for refusing offers

LeavePlus Directors and Employees must not actively seek or solicit offers of gifts, benefits and hospitality, whether for themselves or others.

If a director/employee receives an offer, they must consider the GIFT test at Figure 1 and the requirements below to help decide whether to refuse the offer.

LeavePlus Directors and Employees should refuse offers:

- without a legitimate business benefit (refer 4.6);
- likely to influence them, or be perceived to influence them, in the course of their duties or that raise an actual, potential or perceived conflict of interest;
- could bring them or LeavePlus into disrepute;
- made by a person or organisation about which they will likely make or influence a decision, particularly offers:
    - made during a tender, expression of interest or procurement process by a supplier or potential supplier; or
    - made by a person or organisation involved in a dispute or enforcement action brought by LeavePlus;

- likely to be a bribe or inducement to make a decision or act in a particular way;
- of money, items used in a similar way to money such as gift cards, or items easily converted to money;
- where, in relation to hospitality and events, LeavePlus will already be sufficiently represented to meet its business needs;
- where acceptance could be perceived as endorsement of a product or service, or acceptance would unfairly disadvantage the person or organisation in future procurement decisions; or
- made in secret.

LeavePlus Directors and Employees should take particular care with repeat offers. Receiving multiple offers (token or non-token) from the same person or organisation may generate a stronger perception that the person or organisation can influence the director/employee to whom the offer is made. LeavePlus Directors and Employees should refuse offers from the same source if they create a conflict of interest or may lead to reputational damage.

If an individual considers that they have been offered a bribe or inducement, the offer must be reported to the Company Secretary (who should report any criminal or corrupt conduct to Victoria Police or to the Independent Broad-based Anti-Corruption Commission).

5.3 Acceptance of Token Offers

LeavePlus Directors and Employees may generally accept token offers without approval or declaring the offer, provided the offer does not create a conflict of interest or is not likely to lead to reputational damage.

Token offers, whether accepted or declined, do not need to be declared.

5.4 Acceptance of Non-Token Offers

LeavePlus Directors and Employees can only accept non-token offers if they have a legitimate business benefit.

All accepted non-token offers must be approved in writing by the relevant approver (refer below), reported to the Company Secretary and declared on the Gifts, Benefits and Hospitality Declaration form (Appendix A) and be consistent with the following requirements:

- it does not raise an actual, potential, or perceived conflict of interest or have the potential to bring the individual or LeavePlus into disrepute
- there is a legitimate business reason for acceptance and has a benefit to LeavePlus.

Relevant approvers are:

- the CEO (unless another approver is listed below)
- the Chair of the Board (for offers made to the CEO and board Directors)
- The Chair of the Risk, Audit and Compliance Committee (for offers made to the Chair of the Board)

Offers must generally be approved before they can be accepted. Where there is no opportunity for an individual to seek written approval before acceptance (e.g. where an individual is offered a wrapped gift that they later identify as a non-token gift), the individual must seek approval for the offer as soon as practicable and in any event within five (5) working days.

Gifts that are not accepted should in the first instance be returned to the giver. Where this is not possible, gifts may be donated to charity, raffled to staff for the benefit of a charity or otherwise disposed of at the CEO's discretion.

5.5 Recording and reporting non-token offers of gifts, benefits and hospitality

All non-token offers, whether accepted or declined, must be declared, and reported to the Chief Executive Officer via the Gift, Benefit and Hospitality Declaration form (Appendix A). This will be recorded by the Company Secretary in the LeavePlus Gift, Benefit and Hospitality Register (Appendix B). The business reason for accepting the non-token offer must be recorded on the declaration with sufficient detail to link the acceptance to the interests of LeavePlus.

The Company Secretary will report to the Audit, Risk & Compliance Committee quarterly on the administration and quality control of the gifts, the Gifts, Benefits and Hospitality Policy, processes, and register. The report should include analysis of LeavePlus' gifts, benefits and hospitality risks (including multiple offers from the same source), risk mitigation measures and any proposed improvements.

Individuals who consider that gifts, benefits and hospitality may not have been declared or are not being appropriately managed shall speak up and notify the Company Secretary. In an instance where the declaration or mismanagement involves the Company Secretary, then individuals shall notify the CEO.

LeavePlus will take decisive action, including possible disciplinary action, against individuals who discriminate against or victimise those who make a report[1].

Individuals with direct reports are accountable for overseeing management of their direct reports' acceptance or refusal of non-token gifts, benefits, and hospitality, modelling good practice, and promoting awareness of gifts, benefits and hospitality policies and processes.

5.6 Ownership of gifts offered to individuals

Non-token gifts with a legitimate business benefit that have been accepted by an individual for their work or contribution may be retained by the team member where the gift is not likely to bring them or LeavePlus into disrepute and where written approval has been provided under this Policy. LeavePlus Directors and Employees must transfer to LeavePlus official gifts or gifts of cultural significance or significant value.

6. MANAGING THE PROVISION OF GIFTS, BENEFITS & HOSPITALITY BY LEAVEPLUS (TO DIRECTORS, EMPLOYEES OR TO THIRD PARTIES)

This section sets out the requirements for providing gifts, benefits and hospitality by LeavePlus (whether to LeavePlus Directors and Employees or to third parties).

Figure 2. HOST test

H	Hospitality	**To whom is the gift or hospitality being provided?** Will recipients be external business associates of LeavePlus, or LeavePlus Directors and Employees?
O	Objectives	**For what purpose will hospitality be provided?** Is the hospitality being provided to further the conduct of official business? Will it promote and support the interests of LeavePlus and the Fund? Will it contribute to staff wellbeing and workplace satisfaction?

[1] In accordance with the company's 'Whistleblowers Policy' and 'Performance, Behaviour and Discipline Policy'..

S	Spend	**Is the hospitality reasonable and in line with member and stakeholder expectations?** What type of hospitality will be provided? Will it be modest or expensive, and will alcohol be provided as a courtesy or an indulgence? Will the costs incurred be proportionate to the benefits obtained?
T	Trust	**Will trust in LeavePlus and the Fund be enhanced or diminished?** Could you publicly explain the rationale for providing the gift or hospitality? Will the event be conducted in a manner which upholds the reputation of the public sector? Have records in relation to the gift or hospitality been kept in accordance with reporting and recording procedures?

6.1 Requirements for providing gifts, benefits and hospitality

Gifts, benefits and hospitality may be provided by LeavePlus where it is in the legitimate business interests of LeavePlus to do so. Examples include when welcoming guests, to facilitate the development of business relationships, further business outcomes, to support staff engagement and to celebrate achievements.

When deciding whether to provide gifts, benefits or hospitality or the type of gift, benefit or hospitality to provide, team members must ensure:

- any gift, benefit or hospitality is provided for a business reason that furthers the conduct of official business or other legitimate organisational goals of LeavePlus or the Fund;
- that any costs are proportionate to the benefits obtained for LeavePlus or the Fund, and would be considered reasonable in terms of member and stakeholder expectations (the 'HOST' test at Figure 2 is a good reminder of what to think about in making this assessment); and
- it does not raise an actual, potential or perceived conflict of interest.

All offers of gifts, benefits and hospitality must be within approved budget and within the financial delegation of the team member making the offer.

Where alcohol is offered in conjunction with any hospitality, responsible service of alcohol must be adhered to and non-alcoholic alternatives must be offered.

7. TRAINING

The Company Secretary in conjunction with the Chief People Officer oversees the training program to ensure that:

- All LeavePlus Directors and Employees receive a copy of this Policy during the induction process, and are required to familiarise themselves with the content and requirements;
- Periodic training sessions on the management of gifts, benefits and hospitality are delivered to the Board (at least every 3 years, or when significant changes occur); and
- Periodic training is delivered to all team members, which may include face-to-face workshops as required (at least annually, or when significant changes occur).

8. BREACH OF POLICY

Any breaches or suspected breaches of this Policy must be reported to the Company Secretary. Any non-compliance will be investigated and reported to the Board and Audit, Risk & Compliance Committee on an annual basis or otherwise when the breach or suspected breach is assessed as high risk.

LeavePlus Directors and Employees who breach this Policy may face disciplinary action (consistent with relevant industrial instruments and legislation), up to and including termination of employment.

LeavePlus will communicate its policy on the offering and provision of gifts, benefits and hospitality to contractors, consultants and other business associates. Those identified as acting inconsistently with this Policy may be subject to contract re-negotiation including termination.

9. SPEAK UP

Individuals who consider that gifts, benefits and hospitality or conflicts of interest within LeavePlus may not have been declared or are not being appropriately managed should speak up and notify their manager or the Company Secretary. Individuals who believe they have observed corrupt conduct in their colleagues may also be able to make a public interest disclosure directly to the Independent Broad-based Anti-corruption Commission (IBAC).

LeavePlus will take decisive action, including possible disciplinary action, against individuals who discriminate against or victimise those who speak up in good faith.

10. RECORD KEEPING

The Company shall keep, for at least 7 years (electronic and/or hardcopy) records of:

- Declaration Forms;
- Any reports provided to the Board about gifts, benefits and hospitality matters;
- All Registers; and
- Gifts, benefits and hospitality and related policies (refer to section '11. Related Information')

11. RELATED INFORMATION

11.1 Contacts for further information

LeavePlus Directors and Employees who are unsure about whether to accept or offer gifts, benefits or hospitality, or about the application of this Policy, should ask their manager or should consult the Company Secretary for advice.

11.2 Related policies and procedures

Other LeavePlus policies that should be read in conjunction with this Policy:

- Board and Committee Charters [POL034, POL038, POL030, POL037, POL039]
- Code of Conduct [POL070]
- Board Code of Conduct [POL035]

  Conflict of Interests Management Policy [POL043]
- Speak Up Policy [POL042]
- Performance, Behaviour and Discipline Policy [POL105]
- Fraud and Corruption Policy [POL044]
- Delegations Policy and Register [POL031, POL032]
- Length of Service Awards & Milestone Gifts Policy [POL091]
- Staff Expense Reimbursement Policy [POL023]
- Credit Card Policy [POL024]

11.3 Related legislation & best practice

- *Corporations Act 2001* (Cth)
- APRA – Superannuation Prudential Standard SPS521
- ASX Corporate Governance Principles
- Accounting Standard AASB 124 (Related party disclosures)

APPENDIX A: GIFT, BENEFIT AND HOSPITALITY DECLARATION FORM

This declaration form supports LeavePlus's Gifts, Benefits and Hospitality Policy. Team members must declare all non-token offers of gifts, benefits, and hospitality (whether accepted or declined) and seek written approval from the CEO (or the Chair of the Board in the case of the CEO or a Board Director) before accepting any non-token offer.

All completed forms must be provided to the Company Secretary who will record relevant details in the LeavePlus Register of Gifts, Benefits and Hospitality.

Individual to complete	
1. Declaration date	
2. Name (recipient)	
3. Position (e.g. Executive Director)	
4. Department (e.g. Legal & Compliance)	
Details of the gift, benefit or hospitality	
5. Date offered	
6. Describe the gift, benefit or hospitality offered	
7. Estimated or actual value	
8. Name of person (donor) making the offer	
9. Position of person making the offer	
10. Name of organisation making the offer	
11. Type of organisation; for example: a) supplier or potential supplier; b) conference organisation; or c) lobbying firm	
12. Is the person or organisation making the offer a business associate of the organisation?	☐ Yes ☐ No
13. **If yes**, describe the relationship between them and the organisation. **If no**, describe the relationship between you and the person or organisation making the offer; for example, a personal relationship.	Details:
14. Why is the offer being made?	
15. Would accepting the offer create an actual, potential or perceived conflict of interest? **If yes**, then the offer must be declined in accordance with LeavePlus's Gifts, Benefits and Hospitality Policy	☐ Yes ☐ No Details:

Individual to complete	
16. Would accepting the offer bring you, LeavePlus or the Fund into disrepute? **If yes**, then the offer must be declined in accordance with LeavePlus's Gifts, Benefits and Hospitality Policy	☐ No ☐ Yes Details:
17. Is there a legitimate business benefit to LeavePlus or the Fund for accepting the offer? For example: a) Was it offered during the course of your official duties? b) Does it relate to your official responsibilities? c) Does it have a benefit to the LeavePlus? **If no,** then the offer must be declined **If yes,** then the business benefit must be detailed, in accordance with LeavePlus's Gifts, Benefits and Hospitality Policy	☐ Yes Details: ☐ No
18. Is the offer an official or ceremonial gift provided when conducting business with official delegates or representatives from: a) another organisation; or b) the community **If yes**, please provide details	☐ No ☐ Yes Details:
19. Is the offer high / medium / low risk to LeavePlus and to its reputation and probity standards? **For example,** if the offer is made by a supplier or a potential supplier during a tender process that the supplier is involved with, the offer would be considered high risk	☐ High ☐ Medium ☐ Low Details:
20. I accepted the offer. Signature:_____ Date:_____	☐ Yes ☐ No

Relevant approver to complete	
1. Name	
2. Position (e.g. CEO)	
3. Relationship to team member	
Complete if individual declined offer	
4. I have reviewed this declaration form and submitted it for inclusion on the organisation's gifts, benefits and hospitality register	Signature:_____ Date:_____
Complete if individual accepted offer	
5. I have reviewed this declaration form and, confirm that, to my knowledge, accepting this offer: a) does not raise an actual, potential or perceived conflict of interest for the individual or me; **and** b) will not bring the individual, me, LeavePlus or the Fund into disrepute; **and** c) will provide a clear business benefit to the LeavePlus or the Fund	Signature:_____ Date:_____
6. Record the decision about ownership of the gift; for example did the team member: a) retain the gift; b) accept an official or ceremonial gift on behalf of LeavePlus c) transfer ownership of the gift to the LeavePlus; d) return the gift to the giver; or e) donate the gift to charity?	

Completed form to be submitted to the Company Secretary to be recorded on LeavePlus's Gifts, Benefits and Hospitality Register

APPENDIX B: LEAVEPLUS GIFT, BENEFIT AND HOSPITALITY REGISTER

CoINVEST Gift, Benefits and Hospitality Register – from DD MM YYYY to DD MM YYYY

nb. The term 'Benefit' in this register refers to all gifts, benefits and hospitality events attended/received with a value of >$50.00
Where possible all Benefits are to be Pre-Approved by line-managers.

Gift and Benefit Register												
Date of Entry	Name of Recipient	Name of Provider	Date of Event	Business Associate (Yes/No)	Description of offer	Estimated Value	Reason	Business benefit	Risk (Yes/No)	Decision (Accepted/Rejected)	Ownership	Approved by

END OF DOCUMENT