



# Charging and Remissions Policy

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Applicable to: All Trust Schools

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Adopted by: Trust Lead

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Date reviewed: December 2022

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Authorised Signatory:

Mr Ian Young - Trust Leader &  
CEO

John Hall – Trust Finance  
Committee

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Review Period: Annually

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Next Review: December 2023

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## Record of Policy Changes and Reviews

Date	Details	Reason for Review / Change
August 2022	Policy reviewed against the Academy Trust Handbook 2022 - no changes were required other than a reference in the 'Legal framework' section. A minor change has also been made to the 'Damaged and lost items' section.	Annual Review, Updated guidance

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## Statement of Intent

We are committed to ensuring equal opportunities for all pupils, regardless of financial circumstances, and has established the following policy and procedures to ensure that no child is discriminated against by offering of school trips, activities and educational extras.

In addition, we are committed to adhering to legal requirements regarding charging for school activities, and meeting all statutory guidance provided by the DfE.

### 1. Legal Framework

1.1 This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:

- Education Act 1996
- The Charges for Music Tuition (England) Regulations 2007
- The Education (Prescribed Public Examinations) (England) Regulations 2010
- Freedom of Information Act 2000
- DfE (2018) 'Charging for school activities'
- DfE (2019) 'Governance handbook'
- Our Funding Agreement
- ESFA (2022) 'Academy Trust Handbook 2022'

1.2 This policy operates in conjunction with the following school policies:

- Complaints Procedure Policy
- Debt Recovery Policy
- Freedom of Information Policy and Publication Scheme
- The Trust's Scheme of Delegation
- Finance Policy

### 2. Charging for Education

2.1 We will not charge parent/carers for:

- Admissions applications
- Education provided during school hours (including the supply of any materials, books, instruments or other equipment).
- Education provided outside school hours if it is part of the national curriculum, part of a syllabus for a prescribed public examination that the pupil is being prepared for by the school, or part of religious education.
- Instrumental or vocal tuition, for pupils learning individually or in groups, unless provided at the request of the pupil's parent/carer.
- Entry for a prescribed public examination, if the pupil has been prepared for it at the school.
- Examination re-sits, if the pupil is being prepared for the re-sits at the school.

2.2 We may charge parents/carers for the following:

- Materials, books, instruments or equipment, where a parent/carer desires their child to own them.
- Optional extras
- Music and vocational tuition (in certain circumstances)
- Certain Early Years provision.
- Use of community facilities and other commercial activities.
- Provision of information within the scope of Freedom of Information.

2.3 The school will make it clear that, in the following circumstances, it will propose to remit (wholly or partly) any charge which would otherwise be payable by school.

### 3. Optional Extras

3.1 We can charge parents/carers for the following optional extras such as but not limited to:

- Education provided outside school time that is not:
  - $\frac{3}{4}$  Part of the national curriculum.
  - $\frac{3}{4}$  Part of a syllabus for a prescribed public examination that the pupil is being prepared for at school.
  - $\frac{3}{4}$  Part of Religious Education
- Examination entry fees where the pupil has not been prepared for the examinations at school.
- Transport, other than that required to take the pupil to school or to other premises where the school has arranged for the pupil to be provided with education.
- Board and lodging for a pupil on a residential visit
- Childcare provision provided in addition to a parent/carer's funded entitlement.
- School meals where a parent/carer does not have a free entitlement.
- School milk where a parent/carer does not have a free entitlement.
- Extended day services offered to pupils e.g., breakfast or out-of-school provision.

3.2 When calculating the cost of optional extras, an amount may be included in relation to:

- Materials, books, instruments or equipment provided in relation to the optional extra
- The cost of buildings and accommodation
- The employment of non-teaching staff (including TA's).
- The cost of teaching staff under contracts for services purely to provide an optional extra
- The cost, or an appropriate proportion of the costs, for teaching staff employed to provide vocal tuition or tuition in playing a musical instrument, where the tuition is an optional extra.

3.3 The school will not charge in excess of the actual cost of providing the optional extra divided by the number of participating pupils. A subsidy will not be charged for any

pupils wishing to participate but whose parents/carers are unwilling or unable to pay the full charge. If a proportion of the activity takes place during school hours, the school will not charge for the cost of alternative provision for those not participating.

- 3.4 The school will not charge for supply teachers to cover for teachers who are absent from school accompanying pupils on a residential visit.
- 3.5 Participation in any optional activity will be on the basis of parent/carer choice and a willingness to meet the charges. Therefore, a parent/carer agreement is a pre-requisite for the provision of an optional extra.
- 3.6 If a charge is to be made for a particular activity, such as optional extras, parents/carers will be informed of how the charge will be calculated.

#### **4. Examination Fees**

4.1 We may charge for examination fees if:

- The examination is on the prescribed list (which includes SATs, GCSEs and A levels), but the pupil was not prepared for it at the school.
- The examination is not on the prescribed list, but the school arranged for the pupil to take it.
- A pupil fails, without good reason, to complete the requirements of any public examination where the governing board or LA originally paid or agreed to pay the entry fee.

#### **5. Voluntary Contributions**

- 5.1 We may ask for voluntary contributions towards the benefit of the school or school activities. If an activity cannot be funded without voluntary contributions, we will make this clear to parents/carers at the outset. We will also make it clear that there is no obligation for parents/carers to make a contribution and notify parents/carers whether assistance may be available.
- 5.2 No pupil will be excluded from an activity simply because their parents/carers are unwilling or unable to pay. If a parent/carer is unwilling or unable to pay, their child will still be given an equal opportunity to take part in the activity. If insufficient voluntary contributions are raised to fund an activity, and the school cannot fund it via another source, the activity will be cancelled.
- 5.3 We will strive to ensure that parents/carers do not feel pressurised into making voluntary contributions.

#### **6. Music Tuition**

- 6.1 Instrumental and vocal music tuition is an exception to the rule that all education provided during school hours must be free. The school will provide music tuition as part of the

National Curriculum free of charge, however, the Charges for Music Tuition (England) Regulations 2007 allow for charges to be made for vocal or instrumental tuition provided either individually or to groups of any size – provided that the tuition is at the request of the pupil's parent/carer

- 6.2 The charges will not exceed the cost of the provision, including the cost of the staff providing the tuition.
- 6.3 Charging will not be made if the teaching is an essential part of the national curriculum.
- 6.4 Charging will also not be made if the teaching is provided under the first access to KS2 Instrumental and Vocal Tuition Programme.
- 6.5 No charge will be made in respect of pupils who are LAC.

## **7. Transport**

7.1 We will not charge for:

- Transporting registered pupils to or from the school premises, where the LA has a statutory obligation to provide the transport.
- Transporting registered pupils to other premises where the governing board or LA has arranged for pupils to be educated.
- Transporting pupils to meet an examination requirement when they have been prepared for the examination at the school.
- Transport provided for an educational visit.

## **8. Residential Visits**

8.1 We will not charge for:

- Education provided on any visit that takes place during school hours.
- Education provided on any visit that takes place outside school hours if it is part of the national curriculum, part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of Religious Education.
- Supply teachers to cover for teachers accompanying pupils on visits.

8.2 We can charge for board and lodgings – but the charge will not exceed the actual cost.

8.3 Parents/carers will be exempt from board and lodgings costs if they can prove that they are in receipt of one or more of the following benefits:

- Income Support
- Income-based Jobseeker's Allowance
- Income-related Employment and Support Allowance
- Support under part VI of the Immigration and Asylum Act 1999
- The guaranteed element of Pension Credit

- Child Tax Credit, provided that they are also entitled to Working Tax Credit and have an annual gross income of no more than £16,190
- Working Tax Credit run-on paid for four weeks after they stop qualifying for Working Tax Credit
- Universal Credit – if they apply on or after 1 April 2018, their household income must be less than £7,400 a year (after tax and not including any benefits they receive)

## 9. Education Partly During School Hours

- 9.1 If 50 percent or more of the time spent on an activity occurs during school hours (including time spent travelling if the travel occurs during school hours), it is deemed to take place during school hours and no charge will be made.
- 9.2 Whatever the start and finish times of the school day, regulations require that the school day is divided into two sessions. School hours do not include the break in the middle of the day.
- 9.3 If less than 50 percent of the time spent on an activity occurs during school hours, it is deemed to have taken place outside school hours and we may charge for the activity; however, we will not charge if the activity is part of the national curriculum, part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of Religious Education.
- 9.4 **Residential visits:** If the number of school sessions covered by the visit is equal to or greater than 50 percent of the number of half days (any period of 12 hours ending with noon or midnight on any day) spent on the visit, we will not charge for the activity.
- 9.5 Any charges for extended day services will be optional.

## 10. Swimming Lessons

- 10.1 The school organises swimming lessons for all children in KS2. These take place in school time and are part of the National Curriculum. We make no charge for this activity, but we may ask for a voluntary contribution from parents/carers to cover the cost of transport. We inform parents/carers when these lessons are to take place, and we seek the written permission of parents/carers for their children to take part.

## 11. Use of Community Facilities/Lettings

- 11.1 We will charge for hire of the school facilities in line with our Lettings Policy.

## 12. Freedom of Information

- 12.1 We may charge for costs for requests made under FOI. These charges will be listed in our Freedom of Information Publications Scheme.

### **13. Damaged or Lost Items**

- 13.1 The school may charge for the cost of replacing items that are damaged or lost due to the negligence or poor behaviour of pupils or their parents. Parents will only be charged the replacement cost to purchase the same or equivalent item. The school will consider waiving costs in exceptional circumstances, e.g. financial hardship.

### **14. Remissions**

- 14.1 Parents/carers in times of financial hardship or who are in receipt of benefits as listed in item 8.3 above may be offered or may request assistance in meeting the cost for activities. This will be assessed on a case-by-case basis.

- 14.2 To request assistance, parents/carers should contact the Headteacher.

### **15. School Trip Refunds**

- 15.1 All initial deposits for school trips will be non-refundable. Parents/Carers will be informed of this when provided with initial information about the trip.

- 15.2 In the event that the school has to cancel a trip due to unforeseen circumstances, parent/carer contributions will be refunded. In the event that a school trip is cancelled by a party other than the school due to unforeseen circumstances, it is at the schools' discretion as to whether refund is given to parents/carers.

- 15.3 In the event that a pupil or their parent/carer cancel the pupil's place on a trip, it is at the schools' discretion as to whether a refund is given. The school will take into account the reason for the cancellation, whether the school will be reimbursed for the pupil's place on the trip, and whether the place on the trip can be offered to another pupil.

- 15.4 Where a pupil or their parent/carer have previously cancelled a place on a trip and received a full refund, the school has the right to refuse to allow the pupil to attend future trips and visits.

- 15.5 In the event that a pupil cannot attend a trip at the last minute e.g., due to illness, it is at the schools' discretion as to whether a refund is given. The school will take into account whether the school will be reimbursed for the pupil's place on the trip and whether the place on the trip can be offered to another pupil.

- 15.6 In the event that the school trip is postponed due to unforeseen circumstances, it is at the school's discretion as to what happens with the parent/carer contributions for the trip. The school will consider its' options, which could include carrying forward the money until the trip takes place, transferring the money to another trip or refunding the parent/carer.

- 15.7 In the event that the decision is made to postpone a trip due to foreseen circumstances, it is at the schools' discretion as to what happens with the parent/carer contributions for the

trip. The school will consider its' options, which could include carrying forward the money until the trip takes place, transferring the money to another trip or refunding parents/carers.

- 15.8 Once trip arrangements have been booked and confirmed, if contributions exceed the total cost of the trip, a refund will be given where the excess is greater than £1 per pupil.
- 15.9 The school will deal with cancellations and refunds on a case-by-case basis, ensuring that all pupils and their families are treated equally.
- 15.10 If a parent/carer wishes to make a complaint about refunds, they can do so via the Complaints Procedures Policy.

## **16. Income Generation**

- 16.1 In line with the ESFA's 'Academy Trust Handbook', The Trust will set fees for chargeable services at full cost and reserves the right to apply an additional rate of return when in a commercial environment.

## **17. Freedom of Information Policy and Publication Scheme**

- 17.1 The school's Freedom of Information Policy and Publication Scheme sets out where fees may be charged for the provision of information.

## **18. Monitoring**

- 18.1 This policy will be monitored on an annual basis by the Trust Finance Committee.