

Charging and Remissions Policy



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1.0	28 Feb 2020	S Kiff	Published Version
1.1	23 June 2020	N McDermott	Redrafted layout. Inclusion of reference to early years (5.5) and extended services (5.65 and 7.2) and obligations on LACs. Clarification regarding remissions for PP (10.3). Addition of S12.
2.0	13 July 2022	A Richardson	Update and refresh od referenced Trust roles to ensure consistency with Trust position.

This policy has been written with consideration given to working practices. By adopting this policy, a reduction in workload has been facilitated by reducing the need for individual academies to interpret the policy locally.

Pupil Premium (PP) discretions for Trips is a decision for Principals and those charged with administering the restricted PP funds. The Charges and Remissions policy will ensure this is clear. Principals need to consider the whole child and whether English tutoring is more beneficial than subsidising a trip, for example. Discretions are also only for FSM eligible pupils, not PP. PP budgets are set annually to meet the needs of the child.

Discretionary trip budgets would need to be considered as part of this process. Other school budget or fund raising via Parent, Teachers and Friends Associations (PTFA) may be allocated for trips funded by Voluntary Contributions or Charges.

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1. Aims

- 1.1. The Trust recognises the valuable contribution that the wide range of additional activities, including trips, clubs and residential experiences can make towards pupils' education. The Trust aims to promote and provide such activities both as part of a broad and balanced curriculum for the pupils of the schools and as additional optional activities.
- 1.2. In overview, no charges will be made for Education provided during school hours or outside **school** hours if it is part of the National Curriculum or part of the school's basic curriculum for religious education. However, whenever activities, including educational visits are undertaken, and the individual academy is unable to fully fund such activities, it is intended that voluntary contributions will be invited from parents.
- 1.3. This policy aims to set out
 - robust, clear processes in place for charging and remissions
 - the types of activity that can be charged for and when charges will be made
- 1.4. This policy should be read in conjunction with the following Trust policies
 - Outdoor Education Visits and off-site Activities Policy
 - Health and Safety Policy
 - Debtor Management Policy
 - Finance Policy and Scheme of Financial Delegation
 - Lettings Policy (Use of Community Facilities)

2. Legislation and guidance

- 2.1. This policy is based on advice from the Department for Education (DfE) on charging for school activities and [the Education Act 1996](#), sections 449-462 of which set out the law on charging for school activities in England. Academies are required to comply with this Act through their funding agreements.
- 2.2. This policy complies with our funding agreement and articles of association.

3. Roles and responsibilities

- 3.1. **Principals:** For the purposes of this document, 'Headteacher' includes Executive Head, Headteacher and Principal. The Headteacher is responsible for ensuring staff are familiar with the charging and remissions policy, and that it is applied consistently.
- 3.2. **Staff** are responsible for:
 - a) Implementing the charging and remissions policy consistently
 - b) Notifying the headteacher of any specific circumstances which they are unsure about or where they are not certain if the policy applies

The Trust will provide staff with appropriate training in relation to this policy and its implementation.

3.3. Parents

- a) Parents are invited to notify staff or the headteacher of any concerns or queries regarding the charging and remissions policy.

- b) Parents should familiarise themselves with the [Key Information for Parents/Carers Information About School Trips and Activities](#) page on the Trust website.

4. Activities we cannot charge for

We cannot charge for:

4.1. Admissions Applications

4.2. Education

- a) provided during school hours (including the supply of any materials, books, instruments or other equipment).
- b) provided outside school hours if it is part of the national curriculum ¹, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education.
- c) provided under the first access to the Key Stage 2 instrumental and vocal tuition programme unless the tuition is provided at the request of the pupil's parent

4.3. Transport

- a) provided in connection with an educational visit which is part of the national curriculum. Costs can only be recovered as a voluntary contribution.
- b) For registered pupils to or from the school premises, where the local authority has a statutory obligation to provide transport
- c) for registered pupils to other premises where the governing board or local authority has arranged for pupils to be educated
- d) that enables a pupil to meet an examination requirement when he or she has been prepared for that examination at the school

4.4. Exams

- a) Entry for a prescribed public examination, if the pupil has been prepared for it at the school
- b) re-sit(s) if the pupil is being prepared for the re-sit(s) at the school

- 4.5. **Supply** teachers to cover for those teachers who are absent from school accompanying pupils on a necessary educational visit, whether residential or not.

5. Activities we can charge for

Charges may be made for other activities known as 'optional extras'. Where an optional extra is being provided, a charge may be made for providing materials, books, instruments, or equipment as follows:

- 5.1. Any materials, books, instruments, or equipment, where the child's parent wishes him/her to own them;

¹ It should be noted that 'part of the national curriculum' is not restricted to learning outside the classroom experiences that are specifically subject based (e.g. geography or science fieldwork) and include, for example, activities designed to fulfil requirements under the national curriculum 'inclusion statement' (e.g. developing teamwork skills).

- 5.2. Materials used in practical subjects and project assignments provided parents have agreed in advance that they or the pupil wish to keep the finished product e.g. ingredients or materials.
- 5.3. music and vocal tuition; payments will normally be made directly to the peripatetic teacher through a private arrangement between the parent/carer and teacher.
- 5.4. Use of community facilities such as sports pitches, halls. (see Trust Lettings Policy).
- 5.5. Additional nursery sessions over and above the free entitlement provided by the school. The Trust undertakes that all schools' charges for additional hours above any entitlement hours will be charged at the hourly rate determined by the local authority.
- 5.6. Optional Extras
- 5.7. Education provided **outside** of school time that is not:
- 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.
- 5.8. examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school;
- 5.9. transport (other than transport that is required to take the pupil to school or to other premises where the Trust has arranged for the pupil to be provided with education);
- 5.10. The cost of board and lodging for residential trips, even when taking place largely during school time. (Pupils whose parents are in receipt of eligible benefits ² are exempt from paying the cost of board and lodging).
- 5.11. extended day services offered to pupils (for example breakfast club, after-school clubs). Individual Local Academy Boards may determine if Remissions will apply for parents in receipt of Eligible Benefits and must publish this information on their websites. Charges will be reviewed in June each year for the following academic year and may be subject to revision provided one month's notice is given.

6. Types of Visits

Visits fall under three categories:

Type 1) Necessary Educational Visits	forms a part of National Curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or as part of religious education; May be within or outside school hours. It should be remembered that education provided during school hours must be free.	Charges may not be made but Voluntary Contributions may be requested.
Type 2) Optional Educational Visit	a visit which will enhance a pupil/student's education but is not a necessary part of the national curriculum or prescribed public examination that a pupil/student is being prepared for. The visit may be outside school hours.	Charge may be made as an Optional Extra .

Type 3) Optional School Trip	is organised for the enjoyment and expanding cultural/sporting horizons of children.	Charge may be made as an Optional Extra
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7. Calculating the Cost of Optional Extras

- 7.1. In calculating the cost of optional extras an amount may be included in relation to:
- any materials, books, instruments, or equipment provided in connection with the optional extra;
 - the cost of buildings and accommodation;
 - transport provided in school hours to carry pupils between the school and an activity
 - non-teaching staff;
 - teaching staff engaged under contracts for services purely to provide an optional extra, this includes supply teachers engaged specifically to provide the optional extra; Note: If part of the activity takes place during school hours, no charge can be made for alternative provision for non-participants – for example, a school cannot charge for supply teachers needed to cover teachers on a residential trip.
 - the cost, or an appropriate proportion of the costs, for teaching staff employed to provide tuition in playing a musical instrument, or vocal tuition, where the tuition is an optional extra.
- 7.2. For regular activities such as wrap around care, the charges for each activity will be determined by the Local Academy Committee and reviewed in June each year. Parents must be informed of the charges for the coming year in July each year.
- 7.3. Parental agreement is necessary for the provision of an optional extra which is to be charged for.
- 7.4. Any charge made in respect of individual pupils will not be greater than the actual cost of providing the optional extra activity, divided equally by the number of pupils participating. The value of the voluntary contribution may not include a surcharge to cover for those parents who do not pay
- 7.5. In cases where a proportion of the activity takes place during school hours, the charge cannot include the cost of alternative provision for those pupils who do not wish to participate.
- 7.6. Any charge must not include an element of subsidy for any other pupils who wish to take part in the activity but whose parents are unwilling or unable to pay the full charge.
- 7.7. If part of the activity takes place during school hours, no charge can be made for alternative provision for non-participants –for example, a school cannot charge for supply teachers needed to cover teachers on a residential trip.

8. Voluntary contributions

- 8.1. Although schools cannot charge for school time activities, voluntary contributions may be sought from parents for activities that supplement the normal curriculum.
- 8.2. Requests to parents for voluntary contributions will state that:
- there is no obligation to make a voluntary contribution;
 - pupils will not be excluded if parents' cannot or chose not to pay;
 - pupils of parents who cannot contribute will not be treated any differently;

- d) where there are not enough voluntary contributions to make the activity possible and there is no way to make up the shortfall, the activity will be cancelled.

8.3. Any shortfall may be met from school fundraising, donations or allocated school budget e.g. Sport Premium.

8.4. Requests made for voluntary contributions must not include any element of subsidy for any other pupils wishing to participate in the activity whose parents are unwilling or unable to pay the full charge.

9. Residential Trips

9.1. The School will charge parents for board and lodging on residential visits as well as the full cost when a visit is deemed to be an 'optional extra'. For example, it:

- a) falls wholly or mainly outside school hours, i.e. a skiing holiday during the school holidays is an optional extra.
- b) does not form part of the National Curriculum or the statutory requirements for religious education;
- c) is not part of a syllabus towards a Prescribed Public Examination

9.2. Parents in receipt of Eligible Benefits² will not be liable to pay for board and lodging for residential trips.

10. Remissions

10.1. Schools may set aside a small fund to enable families in financial difficulty to send their children on visits/activities. Parent Teachers Associations' may also support school activities through funding raising. School funding is limited and there is no guarantee that all requests can be met. Assistance will be allocated on a needs basis, and if the full cost of the trip/activity cannot be met through assistance funding and voluntary contributions or allocated school budget, the trip/activity will be cancelled.

10.2. Parents in receipt of Eligible Benefits² will not be liable to pay for board and lodging for residential trips.

10.3. Individual schools may determine an allocation of Pupil Premium funding to support remissions for parents in receipt of Eligible Benefits, which will be determined by the Headteacher. Any such remissions will be included in the statutory Pupil Premium report on each school's websites. Children in receipt of pupil premium income as adopted from care or Ever 6 will not be eligible for trip subsidies.

11. Breakages and Damage

11.1. Where a pupil/student's behaviour results in damage to school property or equipment, parents may be asked to pay for the necessary repair or replacement. Each incident will be dealt with on its own merit and at the academy's discretion.

11.2. This does not in any way detract from the teaching staff's duty to brief pupils thoroughly and to manage a calm and safe working environment for the pupils.

² <https://www.gov.uk/apply-free-school-meals>

12. Owed money and Debt Recovery

- 12.1. Where the school incurs material additional costs in recovering an outstanding debt then the school may decide to seek to recover such costs from the debtor. The debtor will be formally advised in writing that they will be required to pay the additional costs incurred by the school in recovering the debt.
- 12.2. If a response or payment is not received within a reasonable time, the Trust may seek to refer the matter to a Debt Recovery Agency who will take action to recover the funds. All costs will be claimed against the parent/carer. The agency's commission may be as high as 20% and additional set up and collection fees will also be claimed.

13. Refunds

- 13.1. If after completion of a trip or journey a surplus exists, the money will be applied as follows:
- a) If the surplus is greater than 5% of the contribution per head, subject to a minimum of £10, then a refund of the full amount of the surplus will be offered to parents.
 - b) If the surplus is less than 5% of the contribution per head or less than £10, the surplus will be placed in the academy fund.

14. Monitoring arrangements

- 14.1. The CFOO monitors charges and remissions and ensures these comply with this policy.
- 14.2. This policy will be reviewed by the CFOO annually and approved by the Trustees.

APPENDIX A – Trip Categorisation Guidance for Staff

**Educational
Visit
(Optional
Extra)**

**School
Trip
(Optional
Extra)**

START

Will the event provide an element of **Educational** enrichment for the pupils/ students?

YES

NO

Will the event provide an element of **Social** enrichment for the pupils/ students?

YES

Is the visit / event a necessary part of the National Curriculum, e.g. will the students automatically fail their course of study if they do not attend?

Is the visit / trip necessary as part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school

Is the visit/trip necessary as part of a religious education?

Does the majority of the visit take place **WITHIN** the school day?

DfE Guidance states: **The school is allowed to make a charge for board and lodging FOR RESIDENTIAL TRIPS. This is with the exception of pupils whose parents are receiving 'Eligible Benefits'.** Since April 2003 the eligibility criteria that entitle families to an exemption from paying for the cost of board and lodging on residential visits have been aligned with free school meals eligibility criteria. The Headteacher must inform all parents of the right to claim free board and lodging if they are receiving these benefits.

**Necessary
Educational
Trip**

DfE Guidance states: **The governing body CANNOT charge for necessary education that takes place in school hours or outside school hours. This includes transport.** Schools can request "voluntary contributions" . Schools cannot exclude children from taking part in an activity that is part of the national curriculum purely on the grounds that the parent or carer, cannot make, or refuses to make, a contribution.

The entire cost of the visit must be met from "voluntary contributions" or other fundraising activity including the costs for any 'disadvantaged' students.

If the total voluntary contributions, fundraising, or allocated budget do not cover the entire cost / commitment for the event, the event cannot proceed

