



# Charging and Remissions Policy 2024

<b>FREQUENCY OF REVIEW:</b>	<b>Annually</b>
<b>COMMITTEE:</b>	<b>Estates and Finance Committee</b>
<b>RATIFICATION DATE:</b>	<b>5 November 2024</b>
<b>DATE OF NEXT REVIEW:</b>	<b>Autumn 2025 unless there is a material change</b>
<b>AUTHOR:</b>	<b>Chief Finance Officer</b>

Signed.....  
Chair of Estates & Finance Committee

Date .....

Signed .....  
CEO

Date .....

## **Aims**

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.

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 school is unable to fully fund such activities, it is intended that voluntary contributions will be invited from parents.

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.

## **Legislation and guidance**

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 in England. Academies are required to comply with this Act through their funding agreements.

This policy complies with our funding agreement and articles of association.

## **Definitions**

- Charge: a fee payable for specifically defined activities
- Remission: the cancellation of a charge which would normally be payable

## **Roles and responsibilities**

### **The Trust Board**

The Trust Board has overall responsibility for approving the charging and remissions policy, but can delegate this to a committee, an individual Trustee or the Headteacher.

- The Trust Board also has overall responsibility for monitoring the implementation of this policy.
- Responsibility for approving the charging and remissions policy has been delegated to the Chair of the Trust Board and the Chief Education Officer.
- Monitoring the implementation of this policy has been delegated to the Estates & Finance Committee.

### **Headteachers and Executive Headteachers**

Headteachers: 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.

The Chief Education Officer and Headteachers are responsible for ensuring staff are familiar with the charging and remissions policy, and that it is being applied consistently.

### **Staff**

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

## Parents

Parents are expected to notify staff or the Headteacher of any concerns or queries regarding the charging and remissions policy.

### Where charges cannot be made

Below we set out what we cannot charge for:

#### Education

- a. Admission applications
- b. Education provided during school hours (including the supply of any materials, books, instruments or other equipment)
- c. Education provided outside school hours if it is part of:
  - The national curriculum
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the school
  - Religious education
- d. Instrumental or vocal tuition, for pupils learning individually or in groups, unless the tuition is provided at the request of the pupil's parent
- e. Entry for a prescribed public examination if the pupil has been prepared for it at the school
- f. Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school

#### Transport

- a. Transporting registered pupils to or from the school premises, where the local authority has a statutory obligation to provide transport
- b. Transporting registered pupils to other premises where the governing board or local authority has arranged for pupils to be educated
- c. Transport that enables a pupil to meet an examination requirement when he or she has been prepared for that examination at the school.
- d. Transport provided in connection with an educational visit.

#### Residential visits

- a. Education provided on any visit that takes place during school hours.
- b. Education provided on any visit that takes place outside school hours if it is part of:
  - The national curriculum
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the school.
  - Religious education
  - Supply teachers to cover those teachers who are absent from school accompanying pupils on a residential visit.

### Where charges can be made

Below we set out what we can charge for:

#### Education

- a. Any materials, books, instruments or equipment, where the child's parent wishes him or her to own them
- b. Optional extras (see below)
- c. Music and vocal tuition, in limited circumstances
- d. Certain early years provision
- e. Community facilities

#### Optional extras

We are able to charge for activities known as 'optional extras'. In these cases, schools can charge for

providing materials, books, instruments or equipment. The following are optional extras:

- a) Education provided outside of school time that is not part of:
  - The national curriculum
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the school
  - Religious education
- b) Examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school
- c) Transport (other than transport that is required to take the pupil to school or to other premises where the local authority or governing body has arranged for the pupil to be provided with education)
- d) Board and lodging for a pupil on a residential visit
- e) Extended day services offered to pupils (such as breakfast clubs, after-school clubs, tea and supervised homework sessions)
- f) Use of community facilities such as sports pitches, halls. (see Trust Lettings Policy).
- g) 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.
- h) Individual school Governing Bodies 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.

### **Calculating the Cost of Optional Extras**

In calculating the cost of optional extras an amount may be included in relation to:

- a) Any materials, books, instruments, or equipment provided in connection with the optional extra;
- b) The cost of buildings and accommodation;
- c) Transport provided in school hours to carry pupils between the school and an activity
- d) Non-teaching staff;
- e) 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.
- f) 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.
- g) For regular activities such as wrap around care, the charges for each activity will be determined by the Local Governing Body and reviewed in June each year. Parents must be informed of the charges for the coming year in July each year.
- h) Parental agreement is necessary for the provision of an optional extra which is to be charged for.
- i) 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.
- j) 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.
- k) 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.

- l) 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.

### **Music tuition**

Schools can charge for vocal or instrumental tuition provided either individually or to groups of pupils, provided that the tuition is provided at the request of the pupil's parent.

Charges may not exceed the cost of the provision, including the cost of the staff giving the tuition.

Charges cannot be made:

- a) If the teaching is an essential part of the national curriculum.
- b) If the teaching is provided under the first access to the Key Stage 2 instrumental and vocal tuition program.
- c) For a pupil who is looked after by a local authority.

### **Residential visits**

We will charge for board, lodging and travel on residential visits, but the charge must not exceed the actual cost.

### **Voluntary contributions**

As an exception to the requirements set out in section 5 of this policy, the school is able to ask for voluntary contributions from parents to fund activities during school hours which would not otherwise be possible.

Some activities for which the school may ask parents for voluntary contributions include: e.g. theatre visits, school trips, sports/games activities and university visits.

There is no obligation for parents to make any contribution, and no child will be excluded from an activity if their parents are unwilling or unable to pay.

If the school is unable to raise enough funds for an activity or visit, then it will be cancelled.

### **Before and/or after School Care**

Charges will be made for any childcare services offered to pupils before school, after school and during school holidays, with the level of fees and any remissions to be set and reviewed regularly by the Trust Board or individual service provider e.g. Breakfast Club and After School Club.

### **School Milk Scheme**

Up to one third of a pint of milk is available to all children free of charge, regardless of their family circumstances up to the age of 5.

Children who have reached the age of 5 and have not yet reached the age of 19 can continue to receive free school milk if their family is in receipt of free school meals.

Following changes in legislation in 2015 regarding the availability of milk at school, all infant children who are entitled to a free school meal under the Universal Free School Meals Scheme can also now choose milk with a fat content of no more than 1.8% as part of their free meal at lunchtime. All children not eligible for free school meals can also choose to drink milk as part of the school dinner that parents pay for.

## **Damage to Property and Breakages**

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 school's discretion.

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.

## **Debt Recovery/Owed Monies**

The Trust Board authorise the school to take all reasonable measures to collect debts as part of its management of public funds. In doing so, it will observe the relevant financial regulations and any other legal requirements.

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.

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.

## **Refunds**

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 school fund.

## **Monitoring Evaluation and Review Arrangements**

The School Finance Lead and Trust Business Manager will monitor charges and remissions and ensure that they comply with this policy.

The Board of Trustees will review this policy at least every year and assess its implementation and effectiveness. The policy will be promoted and implemented throughout the Trust.