



# Charging and Remissions Policy

Approved by Synergy Finance Committee
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Oct 22
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## 1. Aims

Each school within the Trust aims to:

- Have robust, clear processes in place for charging and remissions.
- Clearly set out the types of activity that can be charged for and when charges will and will not be made.
- Offer a range of activities and visits whilst minimising the financial barriers that may prevent some pupils from taking full advantage of these opportunities.

## 2. 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 to 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.

It's also based on guidance from the DfE on [statutory policies for schools and academy trusts](#).

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

## 3. Definitions

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

## 4. Roles and responsibilities

### 4.1 Governance

The Trust Board has responsibility for approving the Charging and Remissions policy.

Local Governing Boards have responsibility for monitoring the implementation of the Charging and Remissions policy.

### 4.2 Headteachers

Headteachers are responsible for implementing the Charging and Remissions policy, ensuring staff are familiar with the policy, and that it is being applied consistently.

### 4.3 Staff

Staff are responsible for:

- Implementing the charging and remissions policy consistently.
- 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.

### 4.4 Parents

Parents should notify staff or the Headteacher of any concerns or queries regarding the Charging and Remissions policy.

## 5. Where charges cannot be made

Below we set out what we **cannot** charge for:

## 5.1 Education

1. Admission applications.
2. Education provided during school hours (including the supply of any materials, books, instruments or other equipment).
3. 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.
4. Instrumental or vocal tuition, for pupils learning individually or in groups, if the tuition is required as part of the National Curriculum, 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.
5. Entry for a prescribed public examination if the pupil has been prepared for it at the school.
6. Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school.

## 5.2 Transport

1. Transporting registered pupils to or from the school premises, where the Local Authority has a statutory obligation to provide transport.
2. Transporting registered pupils to other premises where the Local Governing Board or Local Authority has arranged for pupils to be educated.
3. Transport that enables a pupil to meet an examination requirement when he or she has been prepared for that examination at the school.

## 5.3 Residential visits

1. Education provided on any visit that takes place during school hours.
2. 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.

## 6. Where charges can be made

Below we set out what we **can** charge for:

### 6.1 Education

1. Any materials, books, instruments or equipment, where the child's parent wishes him or her to own them.
2. Optional extras (see section 6.2).
3. Music and vocal tuition, where tuition is provided at the request of the pupil's parent (see section 6.3).
4. Certain early years provision.
5. Community facilities.
6. Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school **and** the pupil fails, without good reason, to meet any examination requirement for a syllabus.

### 6.2 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:

1. 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.
2. Examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school.
  3. Transport (other than transport that is required to take the pupil to school or to other premises where the Local Authority or Local Governing Board has arranged for the pupil to be provided with education).
  4. Board and lodging for a pupil on a residential visit.
  5. Extended day services offered to pupils (such as breakfast clubs, after-school clubs and supervised homework sessions).
  6. When 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.
    - Support staff.
  7. Teaching staff engaged under contracts for services purely to provide an optional extra (including supply teachers engaged specifically to provide the optional extra).
  8. 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.
  9. 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.
  10. Any charge will 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.
  11. In cases where a small 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.
  12. Parental agreement is necessary for the provision of an optional extra which is to be charged for.

### **6.3 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:

- If the teaching is an essential part of the National Curriculum.
- If the teaching is provided under the first access to the Key Stage 2 instrumental and vocal tuition programme.
- For a pupil who is looked after by a Local Authority.

### **6.4 Residential visits**

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

## **7. 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 which would not otherwise be possible.

Some activities for which the school may ask parents for voluntary contributions include school trips, field trips and sports activities.

From time to time schools may invite non-school based organisations to deliver enhanced extra-curricular activities, including visiting theatre companies and lecturers etc. If such organisations levy a charge, parents may be asked to make a voluntary contribution.

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.

## 8. Activities we charge for

The school will charge for the following activities:

- After-school clubs including Sports Clubs
- Educational Visits
- Educational Visitors into school (where a charge is applied)

Parents will be informed any charges in advance.

## 9. Financial support

Support for cases of hardship will come through voluntary contributions, Pupil Premium funding, and in exceptional circumstances, at the discretion of the Headteacher.

Parents who qualify for support are those in receipt of eligible state benefits (listed under 10.1 below).

All claims of support will be treated in the strictest of confidence.

## 10. Remissions

In some circumstances, the school may not charge for items or activities set out in sections 6 and 8 of this policy. This will be at the discretion of the Local Governing Board and will depend on the activity in question.

### 10.1 Remissions for residential visits

Parents who can prove they are in receipt of any of the following benefits will be exempt from paying the cost of board and lodging for residential visits:

- 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 you're not 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 4 weeks after you stop qualifying for Working Tax Credit
- Universal Credit – if you apply on or after 1 April 2018, your household income must be less than £7,400 a year (after tax and not including any benefits you get)

## 11. Refunds

Refunds shall only be available in the following circumstances:

- If a pupil is not able to take part in an activity due to a clash of activities, planned by the school, for example a music lesson taking place on the same day as a school trip.
- If a pupil is unable to take part in an activity and gives sufficient notice to the school, any refund of costs obtained by the school will be passed to the parent. This would not include, in the case of a school visit, transport costs as this is generally purchased collectively.

- If voluntary contributions exceed the final costs of any activity, refunds will be made to individual pupils, if the amount is equal to or exceeds £20.00 per head. Any surplus funds of less than £20.00 per head will be paid into a central fund to support future trips and activities.
- In exceptional circumstances, at the discretion of the Headteacher.

Schools reserve the right not to refund costs where a pupil is withdrawn from an activity by the school on the basis of the pupil's unacceptable behaviour.

**This policy will be reviewed in full by the Governing Board on an annual basis. This policy was uploaded to Governor Hub in September 2023, to be ratified at the next meeting of the LGB. It is due for review in September 2024.**