

## Finance

# Charges and Remissions Policy

CEO approval:	Sean Kelly	
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## 1. Introduction

1.1 The trust aims to:

- a) Have robust, clear processes in place for charging and remissions
- b) Clearly set out the types of activity that can be charged for and when charges will be made

## 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. Definitions

3.1 The trust defines charge and remission as follows:

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

## 4. Roles and responsibilities

4.1 The Board of Trustees has overall responsibility for monitoring the implementation of this policy. In our Trust, responsibility for approving the charging and remissions policy is by the Board of Trustees.

4.2 Principals are responsible for ensuring staff are familiar with the charging and remissions policy and that it is being applied consistently.

4.3 Our staff are responsible for:

- a) Implementing the charging and remissions policy consistently
- b) Notifying the Principal of any specific circumstances which they are unsure about or where they are not certain if the policy applies

## 5. Where charges cannot be made

5.1 Details of what may not be charged for by Academies / the Trust are set out below:

5.1.1 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:
  - i. The national curriculum

- ii. A syllabus for a prescribed public examination that the pupil is being prepared for at the school
- iii. Religious education
- iv. Instrumental or vocal tuition, for pupils learning individually or in groups, unless the tuition is provided at the request of the pupil's parent
- v. Entry for a prescribed public examination if the pupil has been prepared for it at the school
- vi. Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school

#### 5.1.2 Transport

- a) Transporting registered pupils to or from the Academy premises, where the local authority has a statutory obligation to provide transport
- b) Transporting registered pupils to other premises where the Trust 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 Academy
- d) Transport provided in connection with an educational visit

#### 5.1.3 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:
- c) The national curriculum
- d) A syllabus for a prescribed public examination that the pupil is being prepared for at the Academy
- e) Religious education
- f) Supply teachers to cover for those teachers who are absent from the Academy accompanying pupils on a residential visit

## 6. Where charges can be made

6.1 Details of what may be charged for by Academies / the trust are set out below:

#### 6.1.1 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

## 6.2 Optional extras

6.2.1 We are able to charge for activities known as “optional extras”. In these cases, the Academies / trust 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:
  - i. The national curriculum
  - ii. A syllabus for a prescribed public examination that the pupil is being prepared for at the Academy
  - iii. Religious education
  - iv. Examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the Academy
  - v. Transport (other than transport that is required to take the pupil to the Academy or to other premises where the local authority/trust has arranged for the pupil to be provided with education)
  - vi. Board and lodging for a pupil on a residential visit
  - vii. Extended day services offered to pupils (such as breakfast clubs, after-school clubs, tea and supervised homework sessions)

6.2.2 When 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) Non-teaching staff

6.2.3 Teaching staff engaged under contracts for services purely to provide an optional extra (including supply teachers engaged specifically to provide the optional extra).

6.2.4 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.

6.2.5 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.

6.2.6 Parental agreement is necessary for the provision of an optional extra which is to be charged for.

## 6.3 Music tuition

- 6.3.1 The Academy / Trust can charge for vocal or instrumental tuition provided either individually or to groups of pupils, provided that the tuition is given at the request of the pupil's parent.
- 6.3.2 Charges may not exceed the cost of the provision, including the cost of the staff giving the tuition.
- 6.3.3 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 programme
  - c) For a pupil who is looked after by a local authority
- 6.3.4 Residential visits
- 6.3.5 We can charge for board and lodging on residential visits, but the charge must not exceed the actual cost.

## **7. Voluntary contributions**

- 7.1 As an exception to the requirements set out in paragraph 5 of this policy, the Academy / Trust is able to ask for voluntary contributions from parents to fund activities during school hours which would not otherwise be possible.
- 7.2 Some activities for which the school may ask parents for voluntary contributions include:
- a) School trips
  - b) Sports activities
- 7.3 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 Academy / Trust is unable to raise enough funds for an activity or visit then it will be cancelled.

## **8. Activities the Academies / Trust charges for**

- 8.1 For regular activities, the charges for each activity will be determined by the Trust and reviewed in July each year. Parents will be informed of the charges for the coming year in September each year.

## **9. Remissions**

- 9.1 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 Finance, Audit and Resource Sub-committee and will depend on the activity in question.

## **10. Monitoring arrangements**

- 10.1 The Chief Finance & Operating Officer monitors charges and remissions and ensures these comply with this policy. This policy will be reviewed by the Finance and Resource Sub-committee annually. At every review, the policy will be approved by the Board of Trustees.