



Charging and Remissions Policy

Adopted By: Board of Trustees

Date: 01/04/2023

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Charging and Remissions Policy

Date of Issue:	01 April 2023
Policy applies to:	All staff employed by the Wessex Multi-Academy Trust.
Policy Version Number:	01
Purpose of the document:	To provide guidance and expectations surrounding charging and remissions.
Summary of the main points:	The document provides: 1. An overview into charging and remissions practice across the Trust. 2. An overview of roles and responsibilities across the Trust.
Approved by:	This policy has been adopted from The School Bus.
Reviewer:	Debbie Shutts, Chief Financial Officer
Summary of amendments:	Updated to reflect relevant legislation and statutory guidance
Next review due:	01 September 2024

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1.0 Statement of intent

- 1.1 The Trust recognises the valuable contribution that a wide range of additional activities including trips, clubs, and residential experiences can make towards pupils' education. We promote and provide such activities as part of a broad and balanced curriculum for the pupils in our schools and as additional optional activities.
 - 1.2 The Trust is 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.
 - 1.3 Due to the limited funds in the delegated budget the Trust Board reserves the right to make a charge in the following circumstances for activities organised by Trust schools. The Trust Board will from time to time, review and amend the categories of activity for which a charge may be made.
 - 1.4 Trust schools with Pre School facilities (ages 2-5), are chargeable over and above the pre-school funding allowances.
 - 1.5 In addition, we are committed to adhering to legal requirements regarding charging for school activities, and meeting all statutory guidance provided by the DfE.
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2.0 Legal framework

2.1 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 (2020) 'Governance handbook'
- The trust's Funding Agreement and articles of association
- ESFA (2023) 'Academy trust handbook 2023'

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

- Complaints Policy
- Debt Recovery Policy
- Freedom of Information Policy
- Freedom of Information Publication Scheme
- Finance Regs Procedures and Scheme of Delegation

3.0 Charging for education

3.1 The schools will not charge for:

- Admission applications.
- 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 schools, or part of RE.
- Instrumental or vocal tuition, for pupils learning individually or in groups, unless provided at the request of the pupil's parent.
- Entry for a prescribed public examination, if the pupil has been prepared for it at the schools.
- Examination resits if the pupil is being prepared for the resits at the schools. Except in the circumstances set out in 3.2.

3.2 The schools may charge for:

- Materials, books, instruments or equipment, where the child's parent wishes their child to own them.
- Optional extras (see 3.4).
- Music tuition (in certain circumstances). (see 5.0)
- Certain early years provision. The Trust Board will set extended provision charges, for example, pre-school rates, annually to take effect from 1st September each year. Terms

and conditions of extended provision are incorporated into the paperwork to be completed by the parent/guardian making the booking.

- The use of community facilities and other commercial activities.
- 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
- Cost of replacement items such as lost books, or where they were damaged or broken as a direct result of misconduct on the student's part. This does not in any way detract from the teaching staff's duty to brief students thoroughly and to manage a calm and safe working environment for the students.
- Provision of information within the scope of freedom of information.

3.4 Optional extras

3.4.1 The schools may charge for optional extras. In these cases, schools can charge for providing materials, books, instruments or equipment. The following are optional extras:

- 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
 - Part of RE
- Examination entry fees where the pupil has not been prepared for the examinations at the school
- Transport, other than that required to take the pupil to school or to other premises where the trust board has arranged for the pupil to be provided with education
- Board and lodging for a pupil on a residential visit
- Extended day services offered to pupils, e.g. breakfast clubs, after-school clubs, supervised homework sessions or out-of-school provision

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

- Materials, books, instruments or equipment provided in relation to the optional extra
- Buildings and accommodation
- Non-teaching staff
- Teaching staff under contracts for services purely to provide an optional extra (including supply teachers engaged specifically to provide the 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

3.4.3 The schools will not charge in excess of the actual cost of providing the optional extra divided by the number of participating pupils. In cases where a small proportion of the activity takes place during school hours, the school will not charge for the cost of alternative provision for those not participating.

3.4.4 The schools will not charge for supply teachers to cover for teachers who are absent from school accompanying pupils on a residential visit.

3.4.5 Participation in any optional activity will be on the basis of parental choice and a willingness to meet the charges; therefore, parental agreement is a prerequisite for the provision of an optional extra where charges will be made.

3.4.6 If a charge is to be made for a particular activity, such as optional extras, parents will be informed of how the charge will be calculated on request.

3.5 Examination fees and resits

The school may charge for examination fees if:

- The examination is on the set 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 set 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.

3.6 Where a pupil is entered for a second or subsequent attempt at an examination, the school will pay the fee. Once pupils have left the school, resits must be taken at the school.

If a pupil or their parent consider it to be in the best interests of the pupil to request that an examination is re-marked, any fees involved will be covered by the pupil or their parent. If the awarding body changes the overall grade of the result, the school will not be charged by the awarding body and the parent or pupil will have their fees refunded.

4.0 Voluntary contributions

4.1 The school may, from time-to-time, ask for voluntary contributions towards the benefit of the school or school activities. If an activity cannot be funded without voluntary contributions, the school will make this clear to parents at the outset. There will be no obligation for parents to contribute and parents will be notified regarding whether assistance is available.

4.2 No pupil will be excluded from an activity simply because their parents are unwilling or unable to pay. If a parent 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. Some Trust schools may have a linked charitable association or organisation such as a Parent Teacher Association that may make a contribution to support costs.

4.3 The schools will strive to ensure that parents do not feel pressurised into making voluntary contributions.

5.0 Music tuition

5.1 Instrumental and vocal music tuition is an exception to the rule that all education provided during school hours must be free. 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 parents. The charges will not exceed the cost of the provision, including the cost of the staff providing the tuition.

5.2 Charging will not be made if the teaching is an essential part of the national curriculum.

[Primary phase only] Charging will also not be made if the teaching is provided under the first access to the KS2 Instrumental and Vocal Tuition Programme.

5.3 No charge will be made in respect of pupils who are looked after by a local authority.

6.0 Transport

6.1 The school 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.

7.0 Education partly during school hours

7.1 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 will be deemed to take place during school hours and no charge will be made.

7.2 Whatever the start and finish times of the school day, regulations require that the school day is divided into two sessions. School hours will not include the break in the middle of the day.

7.3 If less than 50 percent of the time spent on an activity occurs during school hours, it will be deemed to have taken place outside school hours and the school may charge for the activity; however, the school 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 RE.

8.0 Residential visits

8.1 The school 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 RE.
- Supply teachers to cover for teachers accompanying pupils on visits.

8.2 The school may charge for board and lodging, but the charge will not exceed the actual cost.

8.3 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, the school will not charge for the activity.

9.0 Damaged or lost items

9.1 The schools 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.

10.0 Remissions

10.1 The school will set aside a fund to enable parents in financial difficulty to send their children on visits and activities. The funding will be limited and there is no guarantee that all requests can be met. Assistance will be allocated on a need's basis, and if the full cost of the trip or activity cannot be met through assistance funding and voluntary contributions, the trip or activity will be cancelled.

10.2 In some circumstances our schools may not charge for items or activities set out in this policy. This will be at the discretion of the Local Governing Body and will depend on the activity in question.

10.3 Authorisation for such remission will be made by the Headteacher/Head of School.

10.4 Parents in receipt of any of the following benefits may request assistance with the costs of activities: This is accessed through a FSM application, which if successful, pupil premium income will be received by the school and can be used for this purpose at the schools discretion.

- 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 State Pension Credit
- Child Tax Credit, provided that they are not also entitled to Working Tax Credit and they 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)

10.5 Other individual exceptional circumstances to be determined at the discretion of the Local Governing Body.

10.6 To request assistance, parents should contact the schools' office. Contact details can be found on each schools' website.

11.0 School trip refunds

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

In the event that the school has to cancel a trip due to foreseen circumstances, parental contributions will be refunded. If a school trip is cancelled by a party other than the school due to unforeseen circumstances, it is at the school's discretion as to whether a refund is given to parents.

In the event that a pupil or their parents cancel the pupil's place on a trip, it will be at the school's discretion as to whether a refund is given. The school will take into account the reason for 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.

Where a pupil or their parents have previously cancelled a place on a trip and received a full refund, the school will have the right to refuse to allow the pupil to attend future trips and visits.

In the event that a pupil cannot attend a trip at the last minute, e.g. due to illness, it will be at the school's 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.

In the event that the decision is made to postpone a trip due to foreseen circumstances, it will be at the school's discretion as to what happens with the parental 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.

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 £15 per pupil. The school will deal with cancellations and refunds on a case-by-case basis, ensuring that all pupils and their families are treated equally.

If a parent wishes to make a complaint about refunds, they will be able to do so via the Complaints Policy.

12.0 Income generation

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.

13.0 Freedom of Information Policy and Publication Scheme

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

14.0 Monitoring and review

The Local Governing Body monitors charges and remissions and ensures these comply with this policy.

This policy will be reviewed by the MAT Finance Trustee annually.

At every review, the policy will be approved by the Board of Trustees.

This policy will be reviewed at least **annually** by the Trustees. The next scheduled review date for this policy is **01/09/2024**.

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