



*Wisdom for life*

# Charging and Remissions Policy

<b>Level of Delegation:</b>	Trustees	<b>Approval date:</b>	18/07/2022
<b>Last reviewed on:</b>	July 2022, June 2023, June 2024	<b>Next review due:</b>	July 2025
<b>Based on:</b>	This policy is based on model from The Key (10 January 2022), which follows DfE Guidance (2018), and policy from St Nicolas & St Mary's (2019)		

## CONTENTS

1. Aims .....	2
2. Legislation and guidance .....	2
3. Definitions .....	2
4. Roles and responsibilities .....	2
4.1. The Board of Trustees .....	2
4.2. The Local Governing Body .....	2
4.3. Headteachers .....	2
4.4. Staff .....	2
4.5. Parents .....	3
5. Where charges cannot be made .....	3
5.1. Education .....	3
5.2. Transport .....	3
5.3. Residential visits .....	3
6. Where charges can be made .....	3
6.1. Education .....	3
6.2. Optional extras .....	4
6.3. Music tuition .....	4
6.4. Residential visits .....	4
7. Voluntary contributions .....	5
8. Activities schools may charge for .....	5

9.	Refunds and remissions .....	5
9.1.	Remissions for residential visits .....	5
9.2.	Refunds and remissions .....	5
10.	Monitoring arrangements .....	5

## PART A – Bishop Otter Academy Trust

### 1. Aims

Our trust aims to ensure that all of our schools:

- 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 is 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. The Board of Trustees

The board of trustees will approve Part A of this policy and delegates to the Local Governing Body the responsibility to approve Part B of this policy and the overall responsibility for the implementation and monitoring of the whole policy (parts A and B).

#### 4.2. The Local Governing Body

The governing board is responsible for approving Part B the charging and remissions policy, but can delegate this to a committee or the headteacher.

The governing board also has overall responsibility for monitoring the implementation of this policy (Parts A and B).

#### 4.3. Headteachers

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

#### 4.4. Staff

School 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.

#### 4.5. Parents

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

## 5. Where charges cannot be made

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

### 5.1. Education

- Admission applications.
- Education provided during school hours (including the supply of any materials, books, instruments or other equipment).
- Education provided outside school hours if it is part of:
  - The National Curriculum  
*Note: although academy trusts don't have to follow the National Curriculum academies can't charge for education that 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
- Instrumental or vocal tuition, for pupils learning individually or in groups, unless the tuition is provided at the request of the pupil's parent.

### 5.2. Transport

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

### 5.3. Residential visits

- 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
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the school.
  - Religious Education

Supply teachers, covering for teachers who are absent from school, accompanying pupils on a residential visit.

## 6. Where charges can be made

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

### 6.1. Education

- Any materials, books, instruments or equipment, where the child’s parent wishes him or her to own them.
- Optional extras (see part B).
- Music and vocal tuition, in limited circumstances (see section 6.3).
- Certain early years provision.
- Community facilities.

## 6.2. Optional extras

Schools 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:

- Education provided outside of school time that is not part of:
  - The National Curriculum
  - Religious education
- Transport (other than transport that is required to take the pupil to school or to other premises where the local authority or governing 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 (such as breakfast clubs, after-school clubs, tea and supervised homework sessions).

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.
- Non-teaching staff.
- Teaching staff engaged 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 tuition in playing a musical instrument, or vocal tuition, where the tuition is an optional extra.

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.

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.

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.

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

Schools 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 are included in Part B.

**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 schools may charge for

The school will charge for activities as set out in Part B.

For regular activities, the charges for each activity will be determined by the governing board and annually. Parents will be informed of the charges for the coming year with at least three months' notice.

## 9. Refunds and remissions

In some circumstances, the school may not charge for items or activities set out in Part B of this policy. This will be at the discretion of the governing board or headteacher (and/or Senior Leadership Team) and will depend on the activity in question.

### 9.1. 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).

### 9.2. Refunds and remissions

The school asks that any requests for a refund or remission (cancellation) of a debt, charge, or penalty, in writing so that it can be considered. Refunds and remissions are given at the discretion of the Headteacher, Senior Leadership Team and/or the Local Governing Body, with reference to any specific policies and procedures relating to the item and situation concerned. For example refunds are generally given if an educational visit is cancelled but would not be given if your child missed the visit due to illness.

## 10. Monitoring arrangements

The headteacher of each school monitors charges and remissions, and ensures these comply with this policy.

Part B of this policy will be reviewed annually by the governing body or headteacher.

At every review, the policy will be approved by the local governing body or headteacher as agreed in Part B of this policy.

# PART B – SCHOOL POLICY



## Charging and remissions policy

<b>Name of School:</b>	St Nicolas & St Mary's CE Primary School
<b>Reviewed:</b>	June 2024
<b>Next Review Date:</b>	June 2025

### 1. Introduction

Part B of this school-level policy should be read in conjunction with Part A set by the Bishop Otter Academy Trust (BOAT).

The governing board is responsible for approving Part B of the charging and remissions policy, but can delegate this to a committee or the headteacher. The governing board also has overall responsibility for monitoring the implementation of this policy (Parts A and B). The responsibility for approving and monitoring the charging and remissions policy may be delegated to a committee.

### 2. 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 are:

#### 1. School visits

Parents are encouraged to contribute towards the cost of the trip. This includes the cost of travel and for the activity e.g. entrance fees.

#### 2. Curriculum enrichment

Sometimes we ask for voluntary contributions towards the cost of special activities in school such as a visiting story teller or theatre group, cooking/barbeques etc.

#### 3. Personal Care Items

Parents will be asked to provide personal care items e.g. nappies, baby wipes, spare clothing. Where these are provided by the school, parents will be asked to make a voluntary contribution towards the cost.

#### 4. Sensory Items

The school may suggest the use of sensory items to help children in the classroom e.g. chewy toys. Generally, the school will provide the first item and if successful will ask parents to make a voluntary contribution towards the cost of additional items.

**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 may be cancelled.

### 3. Activities we charge for

The school will charge for the following activities:

#### 1. Ingredients and Materials

The school may charge for ingredients or materials (either in kind or by payment) in cases where parents or pupils have indicated that they wish to own the finished product.

#### 2. After School and Breakfast Club

The school charges for attendance at after school and breakfast clubs. The governors set the charge for this in consultation with senior staff. The cost is based on staffing costs, including leadership, admin and premises time as well as food, drink and resources. Childcare vouchers are accepted.

**3. Little Fishes Nursery**

Parents will be charged for sessions attended where central funding is not available (e.g. where parents have used up their “free” sessions or where the child is not yet eligible for funding). The charge is based on cost of staffing including senior leadership, admin and premises, as well as resources and supplies.

**4. Clubs and Extra Curricular activities**

The school may charge for attendance at clubs and other extra-curricular activities that take place before school, lunchtimes or after school. The charge is based on staffing costs and materials.

The school may offer attendance at one club free of charge for families in receipt of certain benefits at the discretion of the SLT who will be proactive in contacting families as appropriate.

**5. Fundraising items**

Items sold to raise funds for the school or another charity e.g. Recipe book, red noses are paid for by parents if they wish to purchase the items.

**6. Items for sale**

Other items for sale e.g. school uniform, water bottles and photographs are paid for by parents as appropriate.

**7. Late Collection of Children**

Children should be collected promptly from school, nursery and/or clubs to avoid distress and anxiety for the child and to ensure that school staff are able to get on with their duties. In the event that a child is picked up late, the parent will be charged a £10 fine per hour, or part thereof, per child. Members of the Senior Leadership Team have the discretion to waive the fine but if the child is regularly (more than three times per term) picked up late then fines will be issued. Any parent who does not pay the fines will no longer be able to use the after school club. The cost is a contribution to the overtime costs of two members of staff.