



# Charging and remissions policy

**Sections 1-10 of this Policy covers all HFCMAT schools**

**Section 11 covers any school specific charging arrangements.**

## Document Management

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## 1. Aims

Our 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 be made

## 2. Legislation and guidance

Academies, including free schools, insert:

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.

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 Trust Board of Directors (the 'governing board')

The Board of Directors has overall responsibility for approving the charging and remissions policy.

The Board of Directors also has overall responsibility for monitoring the implementation of this policy.

Responsibility for approving the charging and remissions policy has been delegated to the Audit and Risk Committee.

## **4.2 Headteachers/Head of School**

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

## **4.3 Staff**

Staff are responsible for:

- Implementing the charging and remissions policy consistently
- Notifying the headteacher/head of school 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 are expected to 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**

- 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
  - 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
- Entry for a prescribed public examination if the pupil has been prepared for it at the school
- Examination resit(s) if the pupil is being prepared for the resit(s) at the school

## **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 to cover for those teachers who are absent from school accompanying pupils on a residential visit.

## 6. Where charges can be made

Below we set out what we **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 section 6.2)
- Music and vocal tuition, in limited circumstances (see section 6.3)
- Certain early years provision
- Community facilities
- Examination resit(s) if the pupil is being prepared for the resit(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:

- Education provided outside of school time (see section 6.3) 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

If 50% or more of the time spent on the activity occurs during school hours, it is deemed to take place during school hours. Time spent on travel counts in this calculation if the travel itself occurs during school hours. School hours do not include the break in the middle of the day.

Where less than 50% of the time spent on an activity falls during school hours, it is deemed to have taken place outside school hours. For example, an excursion might require pupils to leave school an hour before the school day ends, but the activity does not end until late in the evening. If a non-residential activity happens partly inside the school day and partly outside of it, there will be no charge if most of the time to be spent on the activity falls within the school day. Conversely, if the bigger proportion of time spent falls outside of the normal school day, charges will be made. When such activities are arranged parents/carers will be told how the charges were calculated.

- Examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school
- 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, accommodation, transport and attraction entry.

- 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 Education partly during school hours**

Where an activity takes place partly during and partly outside school hours, there is a basis for determining whether it is deemed to take place either inside or outside school hours. However, a charge can only be made for the activity outside school hours if it is not part of the national curriculum, not part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school and not part of religious education.

If 50% or more of the time spent on the activity occurs during school hours, it is deemed to take place during school hours. Time spent on travel counts in this calculation if the travel itself occurs during school hours. School hours do not include the break in the middle of the day.

Where less than 50% of the time spent on an activity falls during school hours, it is deemed to have taken place outside school hours. For example, an excursion might require pupils to leave school an hour before the school day ends, but the activity does not end until late in the evening. If a non-residential activity happens partly inside the school day and partly outside of it, there will be no charge if most of the time to be spent on the activity falls within the school day. Conversely, if the bigger proportion of time spent falls outside of the normal school day, charges will be made. When such activities are arranged parents/carers will be told how the charges were calculated.

### **6.4 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

### **6.5 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 during school hours which would not otherwise be possible.

Some activities for which the school may ask parents for voluntary contributions include, but not limited to are:

- School trips
- Sports activities
- Themed activity days
- Residential visit transport and specialist instructor costs.

**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.

The schools will also ask for a voluntary annual contribution to the Diocesan Building Fund.

## **8. Activities/items we charge for**

The school will charge for the following activities:

- **Activities outside of school hours including after school clubs.** We seek to offer additional after school extracurricular sessions to provide a rich tapestry of learning opportunities and for the children to further develop interests and hobbies. Charges may be made for these clubs to cover the cost of materials, resources and external agencies who deliver the activity.
- **Residential visits** – For residential visits, a charge, with the exception of those qualifying for a remission under section 9.2, is made to parents by the Governing Body for the cost of board and lodging for each pupil.
- Materials, books, instruments, ingredients or equipment where a parent wishes their child to own them.
- School meals for pupils if they are not eligible for free school meals.
- School meals for staff and visitors.
- Letting of the school premises. The terms of the letting will depend on the school and facility being hired. Each hire will have a formal hire agreement in place.

For regular activities, the charges for each activity will be determined by the governing board and reviewed in July each year. Parents will be informed of the charges for the coming year in July each year.

When charges are made for any activity, whether during or outside of the school day, they will be based on the actual costs incurred, divided by the total number of pupils participating. There will be no levy on those who can pay to support those who can't or won't. Support for cases of hardship will come through voluntary contributions and fundraising.

Parents/carers who would qualify for support are those who are in receipt of eligible benefits.

The principles of best value will be applied when planning activities that incur costs to the school and/or charges to parents/carers. A proportion of costs incurred as a result of vandalism or other malicious actions by students, parents or carers whilst onsite will be recouped.

## **9. 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 governing board 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 that Working Tax Credit is not also received and the family's annual gross income does not exceed £16,190)
- Working Tax Credit run-on (this is paid for 4 weeks after an individual stops qualifying for Working Tax Credit)
- Universal Credit (if the application was made on or after 1 April 2018, the family's income must be less than £7,400 per year – after tax and not including any benefits)

## **10. Monitoring arrangements**

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

The headteacher/head of school will report to the LGB at each meeting that compliance with the policy and/or detail any breaches.

This policy will be reviewed by the Trust Chief Finance & Operations Officer annually.

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

## **11. School specific charging arrangements**

### **11.1 Our Lady's Catholic Primary**

#### **School meals**

- There is no charge for children who are entitled to free school meals (FSM).
- Pupils who are not entitled to free school meals will be charged in line with the prices as per the catering company. A 'meal deal offer will be available to all pupils the rate of which will be set in line with the FSM daily rate.
- Staff and visitors will be charged in line with the prices as per the catering company and VAT as the applicable rate will be added to the cost.
- Our school meals are provided by the local authority and the cost is £3.05

#### **Breakfast/break time snacks**

- We offer free, complimentary bagels at the start of the school day for students.
- We offer a snack bar service to all students across the school.
- Snack item charges are as follows:
- Toast 30p
- Orange Juice 35p
- Apple Juice 35p
- Milk.32p

#### **Lunchtime / After school clubs**

- Any clubs organised and run by staff are free.
- We have a range of external providers for after school clubs such as football, taekwondo and multi-skills. Each external provider charges their own rates (typically these work out at £5-6 per session).

### **Residential activities**

- When any visit has been organised by the school where there may be a cost for board and lodging, parents will be informed of this before the visit takes place. We will charge anything up to the full cost of board and lodging on residential visits, whether it is classified as taking place during school hours or not. The charge will not exceed the actual cost. Parents who can prove they are in receipt of certain Benefits may be exempt from paying the full cost (PP children are charged 50% of the full price due to their funding).
- Travel charges may apply when the residential activity takes place outside of school hours. The amount charged will be calculated to cover the unit cost per pupil. These charges may not apply to those pupils entitled to remissions, but no other pupils will be charged extra to cover those costs.

### **Refunds**

- Request for refunds for trips will be considered on an individual basis and may be rejected if the school is unable to recoup the costs incurred.
- In all cases of withdrawal, either voluntarily or otherwise, applications should be made in writing to the headteacher. If approved, refunds will be processed via the original method of payment.
- The school reserves the right not to refund costs where a pupil is withdrawn from an activity by the school because of a pupil's breach of the school's behaviour policy.

### **Damage to property and breakages**

- Where school property has been wilfully or recklessly damaged by a student or parent, the school may charge those responsible for some or all the cost of repair or replacement.
- Where property belonging to a third party has been damaged by a pupil, and the school has been charged, the school may charge some or all the cost to those responsible.
- Whether or not these charges will be made will be decided by the headteacher and dependent on the situation.