



# 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 Financial & Operations Officer annually.

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

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

### **11.1 St Joseph's Catholic Primary School**

#### **School Meals for pupils**

- Meals for KS2 children are charged at the government set Free School Meal (FSM) rate per day.
- Some children in KS2 will receive a FMS if they are eligible.
- Nursery (F1) children can purchase a school meal of reduced portion size for the cost of £2.

#### **School Meals for staff & visitors**

- Meals are charged at the government set Free School Meal (FSM) rate per day plus VAT at the applicable rate.

#### **School Milk**

- School milk for pupils is now delivered by an Independent Provider – Cool Milk. Parents pay them directly. No money is collected in school.
- There is no charge for milk to children Foundation Stage 2 to Year 6 if they are on the Pupil Premium Register. However, parents will still need to register their child with Cool Milk.

#### **Uniform Charges**

- Our Uniform is available to purchase from the Wirral Uniform Shop. Items may also be purchased from other providers and embroidered with our logo at Tesco.
- We keep a small stock selection of school ties, polo shirts and water bottles. These are priced as follows:
  - Tie £5
  - Polo shirt £7
  - Water bottles £3

#### **EYFS Foundation 1**

- All children aged 3 are eligible for 15 hours of government funded time; this is available within our core EYFS sessions (5 mornings per week).
- Some F1 children may be eligible for 30 hours of government funded time. This will be available within our full day sessions.
- Eligibility for the free entitlement of 30 hours funded nursery will depend on:
  - if you're working (employed, self-employed, or both)
  - your income (and your partner's income, if you have one)
  - your child's age and circumstances
  - your immigration status

The latest guidance is available at <https://www.gov.uk/30-hours-free-childcare>

### Purchasing extra sessions

- If parents do not qualify for extra funding, additional sessions (afternoons) are offered at a rate of £10 per session per child (1 session = 1 afternoon) subject to availability.
- This charge will be reviewed annually.
- All additional sessions must be agreed with the EYFS Lead and school office in advance by means of a weekly booking sheet.