Policy Document for: Charging and Remissions

Due for Review: Autumn term 2027

Additions/amendments in this version

Oct 26	*Updates made for changes to free school meals*

Introduction

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.

Under the charging provisions of the Education Act 1996, trustees of academies must draw up a statement of their charging and remissions policy before they may charge for certain defined activities.

Education legislation demands that schools, subject to certain exceptions, may not charge for education provided during school hours. However, schools are permitted to charge for other items and experiences provided to the pupils. Schools may also invite voluntary contributions to help support these provisions. At BA MAT we believe the children benefit from outside visits, journeys, visitors and extra-curricular activities in sport and the creative arts. We follow government regulations on charging. When an event takes place during school time, we ask the parents of the children benefiting to share the cost. Legally, we are requesting voluntary contributions, but if we do not receive enough to cover the cost, the activity may be cancelled.

Schools have a duty to inform parents on low incomes and in receipt of certain benefits that support is available towards certain costs when they are being asked to make contributions e.g. towards school visits.

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 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

Definitions

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

Roles and responsibilities

Finance, Audit & Risk Committee (FA&RC)

- TheFA&RC has overall responsibility for approving the charging and remissions policy as well as responsibility for monitoring the implementation across the schools

Head of School/Head Teacher

The Head of School/Head Teacher is responsible for ensuring staff are familiar with the charging and remissions policy, and that it is being applied consistently.

Staff

Staff are responsible for:

- Implementing the charging and remissions policy consistently
- Notifying the Head of School/Head Teacher 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.

Parents

Parents are expected to notify staff or the Head of School/Head Teacher of any concerns or queries regarding the charging and remissions policy.

Where charges cannot be made

Below we set out what we cannot charge for:

Education in School

- 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
    - 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 re-sit(s) if the pupil is being prepared for the re-sit(s) at the school (such as Phonics screening in year 2)

Transport

- Transporting registered pupils to or from the school premises, where the local authority has a statutory obligation to provide transport (such as at Aspire school)
- Transporting registered pupils to other premises where the governing board or local authority has arranged for pupils to be educated
- Transport provided in connection with an educational visit - except where it falls within the meaning of Optional Extras as detailed on Page 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 or part of religious education

Music Tuition

- Children learning to play musical instruments as part of the entitlement curriculum, or part of religious education, unless the tuition is provided at the request of the pupil's parent/carer
- Music tuition charges cannot be made for children who are looked after by the local authority

Where charges can be made

Charges may be made for other activities known as 'optional extras'. Where an optional extra is being provided, a charge may be made for providing materials, books, instruments, or equipment as follows:

Education

- Any materials, books, instruments or equipment, where the child's parent wishes him or her to own them
- Optional extras (see below)
- Music and vocal tuition, in limited circumstances
- Community facilities

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 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.

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

Residential visits

We can charge for board and lodging on residential visits, but the charge must not exceed the actual cost.

The deposit will be held by the company who is offering the residential and will be non-refundable.

When parents confirm that they would like their child to attend and confirm that they will make the full instalment payments, the child will not be able to attend if the full contributions are not made.

Extended Schools

- Various charges as set by the Trustees will apply to the Trust's Breakfast and Afterschool clubs where they run in the schools. Full details are available on the trust website.

Deposits

Any deposits will only be refundable if the company or its agents offer a refund. The amount of any refund will be limited to the funds recovered. The parent may elect to leave the funds with the school as a non recoverable voluntary contribution.

Supplementary Information

Parents can be invited to equip their child with items of personal equipment intended for use solely by their child such as uniform, P.E. Kit, calculators and pens etc.

Breakages and Damage

Where a pupil's behaviour results in damage to school property or equipment, parents may be asked to pay for the necessary repair or replacement. Each incident will be dealt with on its own merit and at the trust's discretion.

Payments to be made

All payments, including dinner money, are to made via the Arbor app. If any parent does not have a bank account or access to the internet they should contact the school office for a voucher which can be used to make a cash payment at the Paypoint network of local shops.

Voluntary Contributions

Although schools cannot charge for school time activities, voluntary contributions may be sought from parents for activities that supplement the normal school curriculum such as school trips which would not otherwise be possible. **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**

Some activities for which the school will ask parents for voluntary contributions include:

- Swimming in upper key stage 2 – to cover costs of transport and rental of swimming pool
- School trips for all year groups – to cover coach/train costs and entry to venue costs
- In-school events/visitors to cover costs to the school
- After school clubs (apart from children who are eligible for Targeted Free School Meals – this does not include children who are eligible for Universal infant Free School Meals or Expanded Free school meals)
- Wrap-around provision such as breakfast and after-school club

This is not a complete list.

Requests to parents for voluntary contributions will state that:

- there is no legal obligation to make a voluntary contribution;
- non-refundable deposits can be requested as part of voluntary contributions
- pupils will not be excluded through parents' inability or unwillingness to pay;
- pupils of parents who cannot contribute will not be treated any differently;
- where there are not enough voluntary contributions to make the activity possible and there is no way to make up the shortfall, the activity will be cancelled.
- Requests made for voluntary contributions made in respect of individual pupils must not include any element of subsidy for any other pupils wishing to participate in the activity whose parents are unwilling or unable to pay the full charge.

Remission of charges

No child is barred from attending because his/her parents have not contributed.

Families eligible for benefits, and others the Head of School/Head Teacher believes are experiencing financial hardship, are not expected or pressured to pay.

We keep such information confidential and handle situations discreetly. Parents who are in receipt of the following benefits are exempt from paying charges for residential trips and any event which incurs a voluntary contribution:

- Universal Credit with Low Earnings: Households in receipt of Universal Credit with an annual net earned household income of £7,400 or less (excluding benefits).
- Income-Related Employment and Support Allowance (ESA): Families receiving income-related ESA.
- Pension Credit: Families receiving the guarantee element of Pension Credit.
- Support under Part VI of the Immigration and Asylum Act 1999: Families receiving asylum support.

Please note this does NOT include all children in EYFS and KS1 who are receiving Universal infant Free School Meals or those eligible for Expanded free school meals.

We also extend this exemption to families who are experiencing financial hardship or severe family

difficulties (such as homelessness) in order to provide support and ensure that the children do not miss out on opportunities.

Monitoring and evaluation

This policy will be monitored and evaluated in the light of changes to legislation and comments received from parents and other interested parties.

Equal Opportunities

At BA MAT we are committed to ensuring equality of opportunity for all members of our school community irrespective of race, religion or belief, gender, gender reassignment, disability, sexual orientation, age, pregnancy or maternity, marriage and civil partnership or socio-economic background. We are determined to develop a culture of inclusion and diversity in which all those connected to the school feel proud of their identity and ability to participate fully in school life. We tackle discrimination through the positive promotion of equality by challenging stereotypes and by creating an environment that champions respect for all. We believe that diversity is a strength that should be respected and celebrated by all those who learn, teach and visit us.

All school policies have an explicit aim of promoting equality and will be reviewed in terms of their contribution and effectiveness in achieving this aim.

Impact assessment

An initial impact assessment has been carried out for this policy and is graded as follows:

A	Positive impact is explicitly intended and very likely
B	An adverse impact is unlikely, and on the contrary the policy has the clear potential to have a positive impact by reducing and removing barriers and inequalities that currently exist
C	An adverse impact is unlikely. On the contrary there is potential to reduce barriers and inequalities that currently exist. There is insufficient evidence, however, for this assessment to be made with as much confidence as is desirable
D	Adverse impact is unlikely, but positive impact is also unlikely
E	Adverse impact is probable or certain, since certain groups will be disadvantaged, either proportionately or absolutely, or both. Remedial action is therefore necessary