Charging and Remissions Policy

Category:	Trust-wide Policy
Authorised By:	Finance Committee under delegated authority from the Board of Trustees
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Version Control

Ver.	Date	Comment
1	September 2017	New policy
2	September 2020	Cyclical review; Updated to reflect the latest model policy from The Key
3	September 2022	Cyclical review; Updated to reflect the new senior leadership structure and the latest model policy from The Key
4	September 2023	Cyclical review; Updated to reflect the latest model policy from The Key
5	September 2024	Cyclical review; reviewed against the latest model policy from GovernorHub Knowledge (The Key)
6	September 2025	Cyclical review; reviewed against the latest model policy from GovernorHub Knowledge (The Key)
7	September 2026	Cyclical review; reviewed against the latest model policy from GovernorHub Knowledge (The Key)

This policy will be subject to ongoing review and may be amended prior to the scheduled date of the next review to reflect changes in legislation, statutory guidance, or best practice (where appropriate).

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1. Aims

The Eden Academy Trust (the 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.
- 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's also based on guidance from the DfE in the Academy Trust Governance Guide

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 (the Board) has overall responsibility for approving the charging and remissions policy, but can delegate this to a committee, an individual Trustee or the Head. Responsibility for approving the charging and remissions policy and monitoring of its implementation has been delegated to the Finance Committee as set out in the current Scheme of Delegation.

The Board, through the Finance Committee, also has overall responsibility for monitoring the implementation of this policy.

4.2. Heads[1]

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

4.3. Staff

Staff are responsible for:

- Implementing the charging and remissions policy consistently

[1] For the purposes of this policy, Head refers to the Headteacher or Head of School/ Satellite as appropriate unless otherwise specified

- Notifying the Head 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/carers

Parents/carers are expected to notify staff or the Head 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 re-sit(s) if the pupil is being prepared for the re-sit(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 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 6.2 below)
- Music and vocal tuition, in limited circumstances (see 6.3 below)
- Certain early years provision
- Community facilities
- 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

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 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
- 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 the 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/carers 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/carer.

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

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/carers to fund activities during school hours which would not otherwise be possible.

Some activities for which the school may ask parents/carers for voluntary contributions include:

- When organising school activities that are not part of the curriculum but enrich the educational experience of the children, the school will invite parents/carers to contribute to the cost of the activity. These contributions are necessary to fund the activity but are voluntary as the school cannot make contributions mandatory.
- The level of contribution is decided by the Head and is designed to cover the cost of the activity without affecting the schools budget allocation.

There is no obligation for parents/carers to make any contribution, and no child will be excluded from an activity if their parents/carers 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.

8. Activities we charge for

The school will charge for the following activities:

8.1. Swimming

The school organises swimming lessons for all children. These take place in school time and, and although they exceed the National Curriculum requirement, the school does not levy a charge to parents/carers.

8.2. After-school activities

The school offers additional after school activities. Some of these activities have a charge where parents/carers are expected to pay the charges made. Trust staff and vehicle costs will be met by the appropriate school.

8.3. Damages or breakages

A pupil responsible for non-accidental damage to school property, such as books, equipment, windows etc, will render the parent liable for the cost of repair or replacement. In cases of accidental damage to personal property within school application to be made to the Head to cover full payment at his/her discretion or refer to the Chief Operating Officer if the claim is considered to be excessive.

In any matter of dispute arising over interpretation, the Head will be guided by the DfE regulations currently in use.

8.4. Uniform

Trust schools present parents/carers with a cardigan or sweatshirt on admission to the school and/or transfer to the Secondary part of the school. Children's

cardigans and sweatshirts are available for sale from the school office at cost price. Adult sizes reflect VAT.

The Trust does not accept responsibility for lost or damaged articles of clothing or any personal possessions.

8.5. Other charges

Each school in the Trust may charge for the use of facilities and in each case the Head will consult with the Chief Operating Officer before any charges for activities are made.

Potential examples of other charges include:

- Hire of school hall or other internal spaces
- Hire of school field
- Hire of hydrotherapy pool
- Minibus Hire

Each case will be treated on its merits considering the cost benefits and the benefits to the school and wider community.

For regular activities, the charges for each activity will be determined by the Head and reviewed annually. Parents/carers will be informed of the charges for the coming year.

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 Head as delegated by the Finance Committee and will depend on the activity in question.

9.1. Remissions for residential visits

Parents/carers 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 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)

10. Monitoring arrangements

The Finance Committee monitors charges and remissions and ensures, in conjunction with the Audit & Risk Committee, that these comply with this policy through the internal scrutiny work.

This policy will be reviewed by Chief Operating Officer annually. At every review, the policy will be approved by the Finance Committee.