

Charges and Remissions Policy

TEAM Education Trust



Revisions approved by: Trust Board

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List of associated policies:

TEAM Financial Procedures
TEAM Procurement Policy
Financial Scheme of Delegation
TEAM Trips and Visits Policy (template)

Version History

Version	Date	Detail	Author
1	01.07.20	Original Policy	
2	13.05.21	This policy has been reviewed by Keystone, no amendments required	SBA
3	12.10.21	Removal of the COO, replaced with CFO	NCO
4	17.10.22	Updated to incorporate definitions, roles and responsibilities, remission and monitoring.	NCO
5	13.10.23	Policy rewrite to give easier reference to what is and is not charged for.	NCO
6	31.10.24	Reviewed, no updates	NCO

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1. Introduction

The Trust aims to:

- Have a 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 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

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 on [statutory policies for schools and academy trusts](#). This policy complies with our funding agreement and articles of association.

Parents on low incomes and in receipt of certain benefits may be eligible for support in terms of contributions requested for school visits. Further guidance can be accessed at: [Charging for school activities \(publishing.service.gov.uk\)](#)

All education during school hours is free, this includes materials and equipment. We do not charge for any activity undertaken as part of the National Curriculum except for individual or group music tuition and cost of travel to swimming lessons where appropriate.

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 Trustee board

The Trustee board has overall responsibility for approving the charging and remissions policy, but can delegate this to a committee, an individual governor or Principal.

The Trustee board also has overall responsibility for monitoring the implementation of this policy.

4.2. Principal

The Principal is 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.
- Notifying the Principal 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 school Principal of any concerns or queries regarding the charging and remissions policy.

5. Where charges are not /cannot be made

In relation to registered students, 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 the entry for an examination for which the school agrees the student should be entered re-sit(s) if the pupil is being prepared for the re-sit(s) at the school or where parents/students are seeking to have an examination remarked they will be required to pay the re-mark fee. However, if the new grade exceeds the original, then this will be refunded.
- Swimming Lessons - The school do not make a charge for swimming lessons as these take place in school time and form part of the National Curriculum. We will inform parents when these lessons take place and ask for written permission for the child to take part in lessons.

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 visit

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

The Trust may charge individuals who are not registered students of one of its schools, for education provided or facilities used by them belonging to the Trust.

6. Where charges can be made

In relation to registered students, 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
- 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 or where a student fails to attend an examination for which they have been entered, unless this is because of ill-health, for which a doctor's note will be required, parents may be expected to meet the cost of the examination entry
- Lost school equipment, books, etc.- Parents will be expected to replace or purchase lost items of school property including IT equipment and books. The cost of these items will be the replacement cost to purchase the same or similar item, at the time the loss occurs.
- Breakages and Damage to School Buildings, Furniture or Property - In cases of wilful damage to the school building, furniture or its equipment, the School's Principal, in consultation with the Chair of the Governing Body may decide to make a charge. The cost of repairs will be as quoted on an individual basis. Where items cannot be repaired, a charge will be made to replace the item based on the current cost to buy new at the time the damage was incurred. Each incident will be dealt with on its own merit and at their discretion.
- Ingredients/materials for practical activities such as cookery and craft -To help school finances, parents may be asked to pay the cost of materials where the finished product is to be kept by the pupil. Costs for these will be calculated based on the cost of the material. No profit will be made. No child will be disadvantaged because of parents' inability to pay, and, therefore, all children will be able to participate in these activities.
- Other Charges - The Principal or Governing Body may levy charges for miscellaneous services up to the cost of providing such services, e.g. Photocopying
- Optional extras (see section 6.2)
- Music and vocal tuition, in limited circumstances (see section 6.3)

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 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) - Parents who choose to use the school's extended hours provision will be informed in advance of the charges applicable which will be reviewed on an annual basis. The charges for our Trust schools may vary, please see the individual school's charges.
- Activities outside or mainly outside school hours -Parents will be expected to meet the full cost. Participation in these activities will be voluntary, when the activity is not part of the national curriculum, not part of a syllabus for a prescribed public examination or not part of

religious education. Prices for individual activities will be provided to gauge interest. Activities will not run where full costs cannot be recovered.

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

7. Lettings

The Trust together with the Local Governing Body is responsible for setting the charges for the hiring of the school premises but has delegated the day-to-day responsibilities of managing lettings to the Principal. Where a letting is agreed, an agreement in writing will be provided, ensuring that the person requesting the letting agrees to the school's terms and conditions and is appropriately insured. Invoices will be issued promptly with payment expected, wherever possible, in advance of the letting date.

All costs associated with letting the school premises must be considered when determining an appropriate charge. The Trusts and Local Governing Body's method of calculating the actual cost of the letting comprises three main elements:

- Energy
- Caretaking/ Premise Fees
- Per Capita costs

However, where appropriate an additional fee may be levied for the following:

- Computer & Printer Costs
- Lettings by non-community/commercial groups
- Excessive cleaning

- Profit Margin
- Wear and Tear
- Other costs

Concessionary rates or free letting agreements may be appropriate in certain situations where it is deemed by the Trust and Local Governing Body to be of benefit to the school, its children or meets community goals. In such situations the reasons for the concessionary rate must be clearly minuted and approved. The organisation requesting the letting must still provide written agreement to the school's terms and conditions and must have appropriate insurance.

8. 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 include school trips, sports activities etc

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.

9. Equality

The school is committed to ensuring equality of opportunity for all pupils, staff, parents, carers and visitors irrespective of their race, gender, disability, religion or belief, sexual orientation, age or pregnancy and maternity. Please view the Trust's Equal Opportunities and Diversity policy on the Trust website www.teameducation.org

10. Remissions

In some circumstances, the school may not charge for items or activities detailed above in this policy. This will be at the discretion of the governing board and will depend on the activity in question.

10.1 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)

11. Monitoring Arrangements

The Principal monitors charges and remissions, and ensures these comply with this policy.

This policy will be reviewed by the CFO annually

At every review, the policy will be approved by the Trustee board.