



## Charging and Remissions Policy

<b>Policy Type</b>	Statutory Trust Policy
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<b>Approved By</b>	Trust Board
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<b>Description of changes</b>	<ul style="list-style-type: none"> <li>i. Update to exemptions in section 2.</li> <li>ii. Section 4 – Optional Extras, addition of reference to schools’ own Late Collection Policies.</li> <li>iii. Section 5 – addition of wording around loss of deposits due to behaviour or attendance concerns.</li> </ul>

## Introduction

SHINE Academies believes that all pupils should have an equal opportunity to benefit from a wide range of activities and visits (curricular and extra-curricular) independent of their parent/carer's financial means. This Charging and Remissions Policy describes how we will ensure a good range of visits and activities are offered and, at the same time, try to minimise the financial barriers which may prevent some pupils taking full advantage of these opportunities.

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 which set out the law on charging for school activities in England. Academies are required to comply with this Act through their funding agreements.

This policy complies with our funding agreement and articles of association.

## 1. Definitions

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

## 2. Where charges cannot be made

Below we set out what we **cannot** charge for:

- Admission applications
- Education provided during school hours (including the supply of any materials, books, instruments or other equipment)
- Education provided outside of school hours if it is part of the National Curriculum, or part of the school's basic curriculum for religious education
- Tuition for pupils learning to play musical instruments (or vocal tuition), unless the tuition is provided at the request of the parent/carer.
- Entry for a prescribed public examination if the pupil is being prepared for it at the school
- Education provided on any trip that takes place during school hours
- Education provided on any trip that takes place outside of school hours if it is part of:
  - The National Curriculum
  - The school's basic curriculum for religious education

- A syllabus for a prescribed public examination that the pupil is being prepared for by the school
- Supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential trip
- Transport provided in connection with an educational visit/trip.

### 3. Where charges can be made

Below we set out what we **can** charge for:

- Any materials (including cooking ingredients), books, instruments or equipment, where the parent/carer wishes their child to own them
- Optional extras (see 4. below)
- The provision of school meals to pupils who are not entitled to Free School Meals and those under the Government's Universal Free School Meal in Key Stage 1 (Reception, Year One, and Year Two).
- The provision of fresh milk each day. This milk is free for children who are entitled to Free School Meals. This milk will be provided to children in the form of a carton or a cup. For parents who would like their child to receive milk and are not entitled to Free School Meals, a charge will be levied that will be no greater than the cost of the milk purchased by the school.
- Vocal or music instrumental tuition provided to either individual pupils or groups of pupils, provided that the tuition is provided at the request of the parent/carer. Charges may not exceed the cost of provision, including the cost of staff providing the tuition
- Community facilities (lettings). Currently not all schools provide lettings. Each school should be contacted for information.
- Replacement of school property or equipment where these have been damaged, broken or lost as a direct result of misconduct on the pupil's part. This does not in any way detract from the teaching staff's duty to brief pupils thoroughly and to manage a calm and safe working environment for the pupils.

### 4. Optional Extras

Charges may be made for some activities that are classed as 'optional extras.'

Optional extras are:

- Education provided outside of school time that is not part of The National Curriculum or part of the school's basic curriculum for religious education
- Examination entry fee(s) if the pupil has not been prepared for the examination(s) at school
- Where any school in the Trust charges a nominal fee for late collection of children at the end of the main school day, or at the end of wraparound provision, please refer to the school's own Late Collection Policy.

- Transport (other than transport that is required to take the child to school or to other premises where the school has arranged for the pupil to be provided with education)
- Board and lodging for a pupil on a residential visit (the charge must not exceed the actual cost)
- Extended day services offered to pupils (such as breakfast clubs, after-school clubs, additional nursery/pre-school hours over and above the pupil's statutory entitlement, 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
- Support 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 students will not be greater than the actual cost of providing the optional extra activity, divided equally by the number of students participating.
- Any charge will not include an element of subsidy for any other students who wish to take part in the activity but whose parent/carer 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 students who do not wish to participate.

Parents/carers will be notified in advance of any such activities and their estimated cost.

Parent/carer consent will be obtained for a child's participation in any such activity for which a charge is to be made.

## **5. Deposits and Withdrawal of Places Due to Behaviour or Attendance Concerns**

In line with the DfE guidance on optional extras and trip charging (DfE, 2018), schools are permitted to charge for non-curricular, optional or residential activities taking place outside school hours, or for board and lodging on residential visits.

Where a parent/carer pays a deposit to secure a pupil's place on a trip:

1. If the school withdraws a pupil's place because the pupil has not met the clearly communicated behavioural or attendance expectations required for safe participation,

2. and the school is unable to recover the cost of the place or incurs additional administrative/time costs in reallocating the place,

...then the school reserves the right to retain all or part of the deposit in order to cover the financial loss incurred.

This approach is consistent with DfE guidance, which permits schools to charge parents the actual costs of optional extras, including “the cost of staff...materials, books, instruments or equipment” and any other direct costs of the activity.

Any retention of a deposit will reflect only the actual, unrecoverable costs to the school and will not generate a surplus.

### Voluntary Contributions and Non-Discrimination

In accordance with the Education Act 1996 and DfE guidance, no pupil will be excluded from an activity during school hours on the basis of inability or unwillingness to pay a voluntary contribution.

However, where a trip is classified as an optional extra, schools are permitted to require payment for the full cost of the activity. In such cases, if behavioural/attendance conditions have been set and a pupil is later unable to attend due to not meeting those conditions, deposit retention may apply as outlined above.

### Communication with Parents/Carers

Parents/carers will receive clear written information before any payment is requested. This will include:

- the total cost and whether the activity is an optional extra or requires voluntary contributions;
- behavioural and attendance expectations linked to participation;
- circumstances under which deposits may be retained;
- Parents/carers will be advised in a timely manner if their child is at imminent risk of losing their place on the trip or other activity due to behavioural or attendance issues.

As per the DfE Charging and Remissions guidance, parents/carers will be deemed to have explicitly agreed to any terms and conditions of the trip by paying part or all of the cost of the trip, including the deposit.

Schools will always aim to minimise financial risk to families and will, where possible, support parents experiencing financial hardship in line with the Trust’s Remissions arrangements.

## **6. Voluntary Contributions**

Schools within the Trust may seek voluntary contributions from parents/carers to fund activities that would otherwise not be possible.

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

School trips  
Sporting activities

There is no obligation for parents/carers to make any contribution, and no pupil will be excluded from an activity if their parent/carer is unwilling or unable to pay.

If the school is unable to raise enough funds for an activity or visit, then it may be cancelled. Where this occurs, parents/carers will be notified from the outset.

## **7. Remissions**

The school may remit in full or in part the cost of any activity for particular groups of parents/carers, for example, in the case of family hardship. This will be at the discretion of the Headteacher and will depend on the activity in question. Criteria for qualification for remission are detailed below:

Pupils who attract pupil premium. Children who are, or have been in care, and children who have a parent/carer who is, or was in the armed forces, are also entitled to pupil premium.

Parents/carers who can prove they are in receipt of any of the following benefits may be exempt from paying the cost of board and lodgings for residential visits, subject to the discretion of the Headteacher. The list of benefits is detailed below. Please contact the school office if you have queries regarding your entitlement.

- Income Support
- Income-based Jobseekers' Allowance
- Income-related Employment and Support allowance
- Support under Part IV of the Immigration and Asylum Act 1999
- The guaranteed element of State Pension Credit
- Child Tax Credit - provided that you are 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 qualification for Working Tax Credit ends
- Universal Credit - if applying on or after 1 April 2018, household income must be less than £7,400 a year (after tax and not including any benefits received)

## **8. Additional Considerations**

The Trust Board recognises its responsibility to ensure that the offer of activities and visits does not place an unnecessary burden on family finances. To this end, we will try to adhere to the following:

- Where possible, we shall publish a list of visits (and their approximate cost) at the beginning of the school year, so that parents/carers can plan ahead.
- Parents/carers will be able to pay in instalments for certain visits.
- We acknowledge that offering opportunities on a 'first pay, first served' basis discriminates against pupils from families on low incomes and we will avoid this method of allocation of places.