




Charging and Remissions Policy

September 2023

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Signature of Chair:	
Author/Reviewer:	Trust Finance Team
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DOCUMENT CONTROL

Unless there are legislative or regulatory changes in the interim, this Policy will be reviewed annually. Should no substantive changes be required at that point, the policy will move to the next review cycle.

First Issue	28 November 2019	
Linked Policies	Trust Complaints Procedures Trust Finance Policy School Uniform Policy Trust Freedom of Information Policy The Trust's Scheme of Delegation and Scheme of Financial Delegation	
Target Audience	All Stakeholders	
Dissemination via	Email and Trust/School websites	
Version	Date	Update Information
1.1	August 2023	Reviewed and updated to ensure policy reflects statutory guidance

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1 Purpose

Mercia Learning Trust recognises the valuable contribution that the wide range of additional activities, including trips, clubs and residential experiences can make in expanding the student experience and aims to promote and provide such activities both as part of a broad and balanced curriculum and as additional optional activities.

2 Aims

We are committed to adhering to legal requirements regarding charging for school activities, and meeting all statutory guidance provided by the DfE.

Our aim is therefore not to charge for education provided during school hours, to set out what charges will be levied for activities, what remissions will be implemented and the circumstances under which voluntary contributions will be requested from parents and carers.

3 Legislation and Guidance

This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:

- Education Act 1996
- The Charges for Music Tuition (England) Regulations 2007
- The Education (Prescribed Public Examinations) (England) Regulations 2010
- Freedom of Information Act 2000
- DfE 'Charging for school activities'
- DfE 'Governance handbook'
- The Trust's Funding Agreement
- ESFA 'Academy Trust Handbook'

4 Educational Activities

4.1 TAKING PLACE DURING SCHOOL HOURS

There is no charge for activities during school hours except for music tuition.

There is no charge for transport during school hours to school-organised activities.

We may charge for:

- any materials, books, instruments, or equipment, where the child's parent wishes him/her to own them (costs will be made clear to parents before charge)

- optional extras (see Section 4.2, taking place outside of school hours (non-residential))
- music and vocal tuition (see Section 5)

We can charge for:

- Early years provision in line with The Education (Charges for Early Years Provision) Regulations 2012 (including provision for a pupil below compulsory school age or provision which is not funded through school's funding)
- Community facilities (see Lettings Policy)

4.2 TAKING PLACE OUTSIDE OF SCHOOL HOURS (NON-RESIDENTIAL)

There is no charge for activities that take place outside of school hours when they are:

- part of the national curriculum, including sports matches against other schools
- part of the syllabus for a prescribed public examination that the pupil is being prepared for by the school
- part of religious education

Charges may be made for some activities that are known as optional extras. Optional extras are:

- education provided outside of school time that is not:
 - a) part of the national curriculum
 - b) part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school; or
 - c) part of 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/governing body have 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 (for example breakfast club, after-school clubs, tea and supervised homework sessions)

Any charge made in respect of individual students will not exceed the actual cost of provision and will not subsidise any other student participating. Any remission of charges for individual students would be met from the main school budget or school fund depending on the activity and circumstances.

A student's participation in the activity is dependent on the agreement of their parent/carer to meet the cost of the activity and this agreement will be a pre-requisite to the student's inclusion.

In 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
- 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 a proportion of the costs, for teaching staff employed to provide tuition in playing a musical instrument, where the tuition is an optional extra.

Participation in any optional extra activity will be on the basis of parental choice and a willingness to pay the charges. Parental agreement is therefore needed for the provision of an optional extra where charges will be made before organising the provision.

4.3 ACTIVITIES THAT TAKE PLACE PARTLY DURING SCHOOL HOURS EITHER ON OR OFF SITE

Where an activity takes place partly during and partly outside school hours, a charge will 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 and charging will be as outlined in Section 4.2, taking place outside of school hours (non-residential).

Where the majority of a non-residential activity, more than 50%, takes place outside school hours, the charge cannot include the cost of alternative provision for those pupils who do not wish to participate. So, no charge can be made for supply teachers to cover for those teachers who are absent from school accompanying pupils on a visit.

Time spent on travel is included in this calculation if the travel itself occurs during school hours. School hours do not include the break in the middle of the day.

4.4 RESIDENTIAL VISITS

We will **not** charge for:

- 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 a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education
- supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential visit
- travel costs where the residential activity is classed as being within school hours

We **will** charge for:

Board and lodging

Where there is a cost for board and lodging, parents will be informed of this before the visit takes place.

We will charge anything up to the full cost of board and lodging on residential visits, whether it is classified as taking place during school hours or not. The charge will not exceed the actual cost.

Parents who can prove they are in receipt of certain benefits may be exempt from paying this cost (see Section 11, Remission of Charges).

Travel

Travel charges may apply when the residential activity takes place outside of school hours. The amount charged will be calculated to cover the unit cost per pupil. These charges may not apply to those pupils entitled to remissions, but no other pupils will be charged extra to cover those costs.

Activities

The school may charge for residential activities that fall outside of school hours (see Section 4.2, taking place outside of school hours (non-residential)).

5 Musical Instrument Tuition

Although the law states that, in general, all education provided during school hours must be free, instrumental, and vocal music tuition is an exception to that rule.

A charge **will** be made for teaching a student to play a musical instrument either individually or in a group if the teaching is **not** an essential part of the National Curriculum or a public examination being followed by the pupil.

The school may charge for teaching requested by parents and delivered by specialist tutors given to either an individual pupil or groups of any appropriate size (provided that the size of the group is based on sound pedagogical principles) to play a musical instrument or to sing. The cost of these lessons may depend on the size and duration of the class as well as the type of instrument.

Where a charge is made, the parent/carer will be invoiced direct by the provider of the tuition in advance of the lessons and the 'contract' underlying that activity will be between the provider and the parent.

Charges will **not** be made for class musical tuition during school hours or out of school hours where it forms part of the syllabus for a prescribed public examination or is required as part of the national curriculum.

There is no charge for signing or instrumental tuition for children in care. This includes instruments, music books and exam fees.

6 Entry for Public Examinations

No charge will be made for a student's first entry to a prescribed public examination for which the student has been prepared for by the school, whether during or outside school hours.

A charge could, however, be made for:

- Re-sit examinations
- Re-marks and clerical checks requested by the student
- Requests for scripts
- An examination for which the student has not been prepared by the school
- Where the student fails without good reason [in the judgement of the Governing Body] to meet the requirement of any public examination e.g. by non-attendance and where the school originally paid the entry fee
- Where without good reason a student's attendance on the course falls below 90%

The charge will comprise the fee levied by the Examinations Board, plus an administration fee to be retained by the school.

7 Loss or Damage to School Property

Where school property e.g. books, windows, furniture, scientific equipment etc., has been wilfully or recklessly damaged, the school may charge those responsible for some or all of the cost of repair or replacement.

Similarly, a charge will be levied in respect of wilful damage, neglect or loss of property belonging to a third party where the school has been charged.

Any charge will be notified to the parent/carer in advance of issuing the invoice.

8 Transport

Parents/carers may be required to meet the cost of transport from home to an activity sanctioned but not provided by the school e.g. travel to Work Experience.

9 Other Charges

Trust schools may levy a charge for miscellaneous services up to the cost of providing such services, e.g. for providing a copy of an Ofsted Report.

10 Voluntary Contributions

The school may ask for voluntary contributions to the school for general funds and/or to fund activities that will enrich our pupils' education. Parents/carers will be invited to make a financial contribution which will be used to:

- Acquire educational resources and fixed assets which would otherwise be unaffordable from the school's main budget
- May be used to subsidise a student participating in an activity outside school hours where that student's parent/carer is experiencing severe financial hardship

In any case where an activity cannot be funded without voluntary contributions, this will be made clear to parents by the school at the outset. If the activity is cancelled, all monies paid will be returned to parents.

There is no obligation for a parent or carer to make any contribution and the school will in no way pressure parents to make a contribution.

The Trust is committed to ensuring fair access and treatment of all pupils. No child will be excluded from an activity simply because his or her parents are unwilling or unable to pay. If insufficient voluntary contributions are raised to fund a visit, or the school cannot fund it from some other source, the visit will be cancelled.

11 Remission of Charges

In order to remove financial barriers, some activities and visits where charges can be made, will be offered at no cost or a reduced cost to parents/carers in receipt of certain benefits, for example, Universal Credit. Other exceptional cases where parents are not on benefits, may also be considered. Parents/carers may apply to the school for remission (also known as a subsidy or waiver) of charges in whole or part towards the charges for activities or the

purchase of uniform items. The school may choose to subsidise part or all of the payment of some charges for certain activities and pupils, and this will be determined by the Headteacher.

A decision will be made based on individual circumstances as to what level of support the school can offer or which items of uniform will be provided free of charge.

Parents/carers must contact the Headteacher or their child's Year Manager/Head of Year to discuss/request remission and if requested, proof of their income or benefit may be required.

Parents who are eligible for the remission of charges will be dealt with confidentially.

In the case of any uniform subsidy, the pupil must at least have more than one term of compulsory education or be starting at the school the following term.

11 Lockers

A returnable deposit of £5.00 will be charged for a school locker key and a 'rental charge' may also be levied. It will be made clear that lockers are not compulsory and that lockers will be provided on a first come first served basis and by application only. Lockers must be re-applied for at the beginning of each school year.