



## **Charging & Remissions Policy**

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### **The Perins MAT**

**2019-2020**

Approved by The Perins MAT Trust Board September 2019

Signed ..... Chair of Trustees

Signed ..... Executive Headteacher

The Perins MAT ('The MAT') strives to ensure that all pupils have an equal opportunity to benefit from school-related activities - both on and off site and within and outside the curriculum - regardless of their family's financial means. To ensure transparency in setting charges and ensure all children are able to access all the provision on offer, this policy sets out The MAT's approach to charging and remissions. It has been informed by national and local authority guidance.

This policy does not apply to charges made and determined by other organisations offering activities and services on school premises.

### **Legislation and guidance**

The 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 activities in England. The activities for which charges cannot and can be made are set out in Appendix A. The policy complies with The MAT's funding agreements and Articles of Association.

In this policy a charge is a fee payable for specifically defined activities and a remission is the cancellation of a charge which would normally be payable.

### **Roles and responsibilities**

The Trust Board have approved this policy and has overall responsibility for monitoring the implementation of this policy.

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

Staff are responsible for implementing the charging and remissions policy consistently and notifying the Executive Headteacher of any specific circumstances which they are unsure about or where they are not certain if the policy applies

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

The Policy will apply as follows:

#### **Activities during school hours (i.e. excluding the lunch break)**

With the exception of music tuition, no charge will be made for activities provided during school hours.

No charge will be made for transport during school hours.

A charge will be made to cover the cost of ingredients or materials where parents/guardians have confirmed in advance that they wish to own the finished product.

### **Activities outside school hours (non-residential)**

No charge will be made for an activity that takes place outside school hours when it is:

- a necessary part of the curriculum
- part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school
- part of the school's basic curriculum for religious education

### **Activities that take place partly during school hours either on or off site (non- residential)**

Where the majority of time spent on a non-residential activity is within school hours, the charging regime will be as if it is fully within school hours.

If the majority of the time spent on a non-residential activity is outside school hours, the charging regime will be as if it happens fully outside school hours.

### **Admissions**

No charge will be made for admission.

### **Before and/or after school care**

Charges will be made for any services offered to pupils before and after school (and during school holidays), with the level of fees and any remissions to be set and reviewed regularly by the Trust Board.

### **Damage to property and breakages**

The MAT will attempt to recover some or all of the costs incurred repairing wilful damage or breakage of school property or wilful damage or breakage of property belonging to a third party where the school has been charged. The actual amount will be determined by the Executive Headteacher.

### **Debt Recovery**

The MAT will take all reasonable measures to collect debts as part of its management of public funds. In doing so it will observe the relevant financial regulations and any other legal requirements.

School staff will follow the procedures to secure the collection of all debts set out in The MAT Bad Debt Recovery Policy.

A formal record of any debts written off will be maintained and this will be retained for 7 years.

### **Music tuition**

No charge will be made if the music tuition is an essential part of the national curriculum or a public examination syllabus being followed by the pupil.

No charge will be made for instrumental and vocal tuition within school hours for children in care.

Charges will be made for instrumental and vocal tuition requested by parents and delivered by specialist tutors within school hours, whether offered to an individual or group of pupils. The actual charges will be approved by the Trust Board in line with Hampshire County Council guidelines and may vary depending on size of group, length of lesson and type of instrument.

Where charges are made for instrumental and vocal tuition they will be remitted for pupils on free school meals as well as in certain other circumstances (e.g. for siblings) in order to ensure specialist music tuition is accessible and affordable for all children.

### **Notebook Scheme**

The annual charges associated with the notebook scheme are explained in the contract with the service provider. From time to time additional charges for out of warranty repairs or damage related to careless ownership may be announced.

### **Optional Activities**

Charges may be made for some other activities that take place outside school hours. The Executive Headteacher will decide which activities to make a charge for. The levels of charge (including any remissions) will be set annually on the recommendation of the Executive Headteacher.

Where a charge is made, the total collected will not exceed the cost of providing the activity and no parent will be asked to subsidise the cost to other pupils by paying more than an amount equal to the total cost of the activity divided by the number of pupils participating.

Costs that are legally recoverable are:

- teaching staff engaged under contracts for services purely to provide an optional extra; this includes supply teachers engaged specifically to provide the optional extra
- non-teaching staff
- any materials, books, instruments or equipment provided in connection with the optional extra
- transport to an activity outside school hours

### **Public examinations**

No charge will be made for the entry fee if the examination is: on the set list and the pupil has been prepared at the school; on the set list, but the pupil was not prepared for it at

school; or where the examination is not on the set list, but school has arranged for the pupil to take it

The Executive Headteacher will determine if parents will be charged the examination fee and resit fee if a pupil fails without good reason to complete the requirements of a public examination where the school originally paid the entry fee.

### **Remissions and concessions**

In some circumstances the school may choose to subsidise, in full or part, charges for certain activities and pupils. This decision will be at the discretion of the Trust Board and will depend on the activity in question. Any concessions will be reviewed regularly.

Parents who can prove they are in receipt of the following benefits will be exempt from paying the cost of board and lodging for residential visits:

- Universal credit in prescribed circumstances
- Income Support
- Income Based Jobseekers Allowance
- Support under part VI of the Immigration and Asylum Act 2002
- Child Tax Credit, provided that Working Tax Credit is not also received and the family's income (as assessed by Her Majesty's Revenue and Customs) does not exceed £16,190 (as at time of policy review)
- The guarantee element of State Pension Credit
- An income related employment and support allowance that was introduced on 27 October 2008

Charges will be remitted in compliance with legal requirements for pupils defined as eligible.

### **Residential Trips**

Residential trips are classified as being within school hours if the number of school sessions (morning and afternoon) missed by the pupils is at least 50 per cent of the number of half days spent on the trip.

Irrespective of whether a residential trip is classified as within or without school hours for other purposes, pupils will be charged the full cost of board and lodging except where pupils are legally entitled to remission. In such cases no charge will be made for board and lodging.

### **School meals**

No charge will be made for pupils entitled to free school meals.

All pupils not entitled to free school meals will be charged an amount determined in The MAT's contract with the school meal providers.

## **School Trips**

Appendix B deals specifically with school trips.

If a trip is classified as being within school hours, no charge will be made for travel costs although a voluntary contribution may be sought.

Where the trip is classified as being outside school hours, a charge will be made for travel to cover the unit cost per pupil other than those entitled to remissions. Paying pupils will not be required to subsidise the cost of non-paying pupils.

## **Voluntary contributions**

In certain circumstances parents may be invited to make a voluntary contribution towards activities that are exempt from charging. Any request will make it clear that children of parents who choose not to contribute will not be treated differently from those who do. No pupil will be excluded from the activity if their parents do not contribute.

If an activity is dependent on a level of voluntary contributions this reliance will be explained to parents when the contribution is requested. If the activity has to be cancelled due to insufficient funds, all monies received will be returned to parents.

## **Equality Impact**

The underlying principle of the charging and remissions policy is equality of access to school activities ensuring that all provision remain accessible to as many pupils as possible. The policy has been framed in the light of the current demographics of the school and the consequent impact on the resources.

This policy will be regularly monitored and periodically reviewed taking into account equalities issues to ensure that it remains effective and reflects national guidance and legal requirements.

## **Monitoring arrangements**

The Chief Finance Officer will routinely monitor charges and remissions to ensure that they comply with this policy.

This policy will be periodically reviewed to ensure that it reflects the appropriate Regulations and guidance from the DfE. At every review, the policy will be approved by the Trust Board.

## Appendix A

### Summary of guidance from the Department for Education (DfE) on charging for school activities

#### Where charges cannot be made

1. Admission applications
2. Education provided during school hours (including the supply of any materials, books, instruments or other equipment)
3. 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
4. Instrumental or vocal tuition, for pupils learning individually or in groups, unless the tuition is provided at the request of the pupil's parent
5. Entry for a prescribed public examination if the pupil has been prepared for it at the school
6. Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school
7. Transporting registered pupils to or from the school premises, where the local authority has a statutory obligation to provide transport
8. Transporting registered pupils to other premises where the governing board or local authority has arranged for pupils to be educated
9. Transport that enables a pupil to meet an examination requirement when he or she has been prepared for that examination at the school
10. Transport provided in connection with an educational visit
11. Education provided on any visit that takes place during school hours
12. 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

13. Supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential visit

#### **Where charges can be made**

1. Any materials, books, instruments or equipment, where the child's parent wishes him or her to own them
2. Providing materials, books, instruments or equipment as optional extras. Parental agreement is necessary for the provision of any optional extras which will be charged for including:
3. 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
4. Examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school
5. Transport (other than transport that is required to take the pupil to school or to other premises where the local authority/governing board has arranged for the pupil to be provided with education)
6. Board and lodging for a pupil on a residential visit but the charge must not exceed the actual cost.
7. 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 hiring venues 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)
- 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.



- 8.** 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 but cannot be made if:

the teaching is an essential part of the national curriculum; or

the teaching is provided under the first access to the Key Stage 2 instrumental and vocal tuition programme; or

the pupil is looked after by a local authority.

## Appendix B

### School Trips

Every opportunity will be taken to enable pupils to benefit from off-site visits and to arrange the funding in partnership with parents so that all can take part. Whatever the category, any trip is expected to make a valuable contribution to the experience of all participating. The benefits will range from giving participants first-hand experience of places, events, and activities they have read or heard about in the classroom to give them the opportunity to gain insights into the commercial, industrial, social or cultural life of the community. Moreover every trip provides pupils with the opportunity to learn and practise appropriate behaviour away from school and as part of a group.

### Priorities

All trips will make demands on the school's resources. Accordingly for the purposes of identifying priorities the following categories of trip will apply:

- Is a required component of an examined course;
- Is a required component in a non-examined programme of study;
- Is a planned option within a programme of study (e.g. foreign exchange trip in Modern Languages);
- Is organised to enable pupils to represent the school in a sporting or cultural activity;
- Is part of the general curriculum aim(s) of the School even though it may not form part of any specific programme of study (e.g. ice-skating trip, tutor group outing).

The Executive Headteacher will decide whether trips will take place.

### Funding

The principles for funding trips are established in the Charging and Remissions Policy.

A contingency fund is established in the Trust's unofficial account to meet unforeseen expenditure and to pay for children to go on trips who cannot meet the costs themselves. The fund is financed from the accumulated surpluses from trips run in previous years.

Any surplus at the end of the trip that is in excess of £10 per pupil will be offered as a refund to parents. Surpluses below £10 per pupil will be retained in the contingency account.