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Charging and Remissions Policy

Aims

The Trust and its schools aim 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
- ensure that charges are made only where permitted by law
- ensure that charging arrangements do not create unnecessary financial barriers to students participating in school activities

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 449-462 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.

Definitions

Charge: a fee payable for specifically defined activities, goods or services where charging is permitted.

Remission: the cancellation, reduction or waiver of a charge which would normally be payable.

Optional extra: education or an activity provided in circumstances where a charge is permitted under the Education Act 1996 and relevant guidance.

Roles and responsibilities

Executive Team

The Executive Team has overall responsibility for approving the Charging and Remissions Policy.

The Trust board also has overall responsibility for monitoring the implementation of this policy, which has been delegated to the Executive Director of Finance.

Headteacher

The Headteacher is responsible for the implementation of the policy and ensuring staff are familiar with the Charging and Remissions Policy, and that it is being applied consistently. The Headteacher is also responsible for ensuring that charges and requests for voluntary contributions are communicated clearly to parents/carers.

Executive Director of Finance

The Executive Director of Finance is responsible for Trust-wide financial oversight.

Staff

Our staff are responsible for:

- Complying with the policy and not create unauthorised charges.
- Notifying the Headteacher of any specific circumstances which they are unsure about or where they are not certain if the policy applies.
- The senior leadership team will provide staff with appropriate training in relation to this policy and its implementation.

Parents/Carers

Parents/Carers are expected to notify staff or the Headteacher of any concerns or queries regarding the Charging and Remissions Policy. Parents/Carers experiencing financial hardship are encouraged to contact the school confidentially so that any available remission or other assistance can be considered.

Where charges *cannot* be made

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

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 student is being prepared for at the school
 - religious education.
- Instrumental or vocal tuition, for students learning individually or in groups, unless the tuition is provided at the request of the student's parent/carer.
- Entry for a prescribed public examination if the student has been prepared for it at the school. If a student fails, without good reason, to meet any examination requirement for a syllabus, in such cases a charge will be made.
- Examination re-sit(s) if the student is being prepared for the re-sit(s) at the school. If a student fails, without good reason, to meet any examination requirement for a syllabus, in such cases a charge will be made.

Transport

- Transporting registered students to or from the school premises, where the local authority has a statutory obligation to provide transport.
- Transporting registered students to other premises where the school or local authority has arranged for students to be educated.

- Transport that enables a student 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.

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 student is being prepared for at the school
 - religious education.
- Supply teachers to cover for those teachers who are absent from school accompanying students on a residential visit.

Where charges *can* be made

Below we set out what the school **can** charge for.

Education

- Any materials, books, instruments, or equipment, where the student's parent/carer wishes him or her to own them
- Optional extras (as set out below)
- Music and vocal tuition, in limited circumstances
- Certain early years provision
- Community facilities
- Extended day and wraparound services

Any charge must be properly authorised and calculated in accordance with this policy and Anthem's financial procedures.

Optional extras

We are able to charge for activities known as 'optional extras'. In these cases, the school 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 student is being prepared for at the school
 - religious education.
- Examination entry fee(s) if the registered student has not been prepared for the examination(s) at the school.
- Examination entry fee(s) may be charged to parents/carers if:
 - the student was not prepared for the examination at the school
 - the examination is not on the National Curriculum, but the school arranges for the student to take it

- a student fails, without good reason, to complete the requirements of any public examination where the school originally paid or agreed to pay the entry fee.
- Transport (other than transport that is required to take the student to school or to other premises where the local authority/school has arranged for the student to be provided with education).
- Board and lodging for a student on a residential visit.
- Extended day services offered to students (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 students will not be greater than the actual cost of providing the extra optional 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 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 students who do not wish to participate.

Parental agreement is necessary for the provision of an optional extra which is to be charged for.

Music tuition

The school can charge for vocal or instrumental tuition provided either individually or to groups of students, provided that the tuition is provided at the request of the student'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 student who is looked after by a local authority

Residential visits

The school can charge for board and lodging on residential visits, but the charge must not exceed the actual cost. Where the education provided on a residential visit cannot lawfully be charged for, no charge will be made for that education.

Parents/Carers who meet the statutory criteria for remission will not be required to pay the charge for board and lodging where the statutory remission provisions apply.

The school may also provide additional discretionary assistance in cases of financial hardship in accordance with the Remissions section of this policy.

Extended day and wraparound services

The school may charge for extended day and wraparound services where charging is permitted. This may include breakfast clubs, after-school clubs, and other childcare or supervised activities outside the provision which the school is required to provide free of charge.

Schools may operate separate terms and conditions for these services, including arrangements for payment, cancellation and non-attendance.

Charges will be set having regard to the cost of providing the service and Anthem's financial procedures.

Community use

The school may let out its premises and facilities to members of the local community, other organisations with the Local Authority, businesses, charities and sports clubs.

Charges for lettings and other community use will be set having regard to the cost of providing the facilities and services, Anthem's charitable objects, any restrictions affecting the use of Anthem's land and buildings and the requirements of the Academy Trust Handbook.

Fees for chargeable services will normally be set to recover the full cost of providing the service. Where appropriate in a commercial environment, an additional return may be included.

Voluntary contributions

As an exception to the requirements set out in the 'Where charges *cannot* be made' section 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.

There is no obligation for parents/carers to make any contribution, and no student 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 will be cancelled.

Remissions

In some circumstances the school may not charge for items or activities set out in the 'Where charges *can* be made' section of this policy. This will be at the discretion of the Headteacher and will depend on the activity in question.

Applications for discretionary remission will be considered by the Headteacher having regard to:

- the nature and cost of the activity
- the financial circumstances of the parent/carer
- whether the student is eligible for pupil premium or other financial support
- whether the family is experiencing exceptional or temporary financial support
- the educational or pastoral benefit of the activity to the student
- any funding or other assistance available to the school

The school may provide full or partial discretionary remission where its budget allows.

Remissions for residential visits

Parents/Carers 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:

- 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, where annual household earnings are £7,400 or less after tax and not including benefits received.

Monitoring and review

The Executive Director of Finance monitors charges and remissions and ensures these comply with this policy. This policy will be reviewed by the Executive Director of Finance every two years. At every review, the policy will be approved by the Executive Team.