



Monkwood Primary School

CHARGING AND REMISSIONS POLICY

Updated March 2018

This policy has been adopted from Local Authority's guidance and amended for the Trust.

Aim

The aim of this policy is 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.

Responsibilities

The Trustees are responsible for determining the content of the policy, the Local Academy Board is responsible for monitoring the policy and the Executive Head and Head of School are responsible for implementation. Any determinations with respect to individual parents will be considered jointly by the Executive Head/Head of School and Local Academy Board.

Charges cannot be made for

The Trustees recognises that the legislation prohibits charges for the following:

- 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, 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;
- tuition for pupils learning to play musical instruments if the tuition is required as 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;
- entry for a prescribed public examination, if the pupil has been prepared for it at the school;
- examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school;
- education provided on any trip that takes place during school hours;
- education provided on any trip 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 trip;
- transporting registered pupils to or from the school premises, where the Local Education Authority has a statutory obligation to provide transport;
- transporting registered pupils to other premises where the Local Academy Board or Local Authority has arranged for pupils to be educated;
- transport that enables a pupil to meet an examination requirement when they have been prepared for that examination at the school;
- transport provided in connection with an educational trip where the transport in question is the Academy mini bus.

Publication of Information

This policy will be publicised on the websites of the Academies within the Trust which will specify what charges are/are not to be made and for which activities voluntary contributions will be invited from parents.

Charges

The Trustees have determined that the Academies will subsidise the visits for all children in the school by at least 20% and provide the costs of the visit to parents in writing prior to the visit. Any charges made will aim to meet only the actual cost of the visit and any profit will be the result of the rounding of the individual charge. Any individual charge will be rounded to the next 50 pence or whole pound.

A charge will be made for the following activities:

- a) board and lodging on residential visits (not to exceed the actual costs provided)
- b) the proportionate costs for an individual child for activities wholly or mainly outside school hours to meet the costs for:
 - i. travel
 - ii. materials and equipment
 - iii. non-teaching staff costs
 - iv. the costs of instructors and leaders provided by the place of the visit if these staff will a) enhance the visit taking place or b) be required for health and safety reasons in order that the activity can take place e.g. Outdoor Adventurous Activities
 - v. entrance fees
 - vi. insurance costs
- c) vocal and musical instrument tuition
- d) re-sits for public examinations where no further preparation has been provided by the school
- e) costs of non-prescribed examinations where no further preparation has been provided by the school
- f) any other education, transport or examination fee unless charges are specifically prohibited
- g) breakages and replacements as a result of damages caused wilfully or negligently by pupils
- h) extra-curricular activities and school clubs.

With regard to the above consideration will also be given to:

- a) The proportion of the costs where a charge is to be made
- b) Whether any remission is to be extended beyond the statutory minimum
- c) Whether or not special consideration needs to be given to hardship cases not contained within the exemptions and how this is to be determined
- d) The level of support from school funds if any where the level of voluntary contributions is insufficient to fund the visit or journey or whether the visit is cancelled as it will not cover the costs
- e) Arrangements for education where the parents fail to pay the charge being levied by the school.

In the case of any of the above consultation will take place and the decision will be made by the Executive Head Teacher on behalf of the Local Academy Board and Trustees.

Remission

Children whose parents/carers are in receipt of the following support payments will, in addition to having a free school lunch entitlement or the allocation of pupil premium payments, also be entitled to the remission of charges for board and lodging costs during residential trips. The relevant support payments are:

- (a) Income Support
- (b) Income Based Job Seekers Allowance
- (c) Support under Part V1 of the Immigration and Asylum Act 1999
- (d) Child Tax Credit
- (e) The guarantee element of State pension Credit
- (f) An income related employment and support allowance

In respect of all of the above account will be taken of any revision to the amount as advised by the appropriate Authority where applicable.

Voluntary Contributions

Parents will be invited to make a voluntary contribution for some or all of the following:

- a) Travel Costs as given by the transport provider
- b) Entrance fees to sites of interest such as museums, gallery's parks etc
- c) Educator/artists fees
- d) Insurance Costs

The terms of any request made to parents will specify that the request is for a voluntary contribution and in no way represents a charge. In addition the following will be made clear to parents:

- a) that the contribution is genuinely voluntary and a parent is under no obligation to pay
- b) that registered pupils at the school will not be treated differently according to whether or not their parents have made any contribution in response to the request

The responsibility for determining the level of voluntary contribution is delegated to the Executive Head Teacher / Head of School within the agreement that the Academy subsidises the total cost of all visits by 20% to increase access for all.

Appendix A

Legislation

- Chapter III of the Education Act 1996, sections 449-462
- The Education (School Sessions and Charges Remissions Policies) (Information) (England) Regulations 1999
- The Education (Residential Trips) (Prescribed Tax Credits) (England) Regulations 2003
- The Education (Residential Trips) (Prescribed Tax Credits) (England) (Amendment) Regulations 2005
- The Charges for Music Tuition (England) Regulations 2007

Further Guidance

- Charging for School Activities January 2009
<http://www.teachernet.gov.uk/docbank/index.cfm?id=8145>
- Guide to the Law for School Governors (Chapter 23 Charging for School Activities). January 2010. <http://www.governornet.co.uk/linkAttachments/GTTL%2024.10.09.pdf>
- Developing a Learning Outside the Classroom Policy
<http://www.lotc.org.uk/pdf/1.3.2%20Developing%20a%20LOtC%20policy.pdf>

Appendix B

Questions and Answers From DfE Guidance

Q What is a charging policy?

A Under the charging provisions set out in legislation, governing bodies and local authorities of maintained schools may choose to charge for certain defined activities, but only if they have first drawn-up charging and remissions policies. These policies should be made available to parents on request.

Q A visit involving staying overnight has been arranged for children at my school. Can the school charge for this?

A Where a school activity requires pupils to spend nights away from home the school is allowed to make a charge for board and lodging. This is with the exception of pupils whose parents are receiving: Income Support; Income-based Jobseeker's Allowance; Support under part VI of the Immigration and Asylum Act 1999; or Child Tax Credit (providing that they do not also receive Working Tax Credit and have an annual income, assessed by the Inland Revenue that does not exceed £15,575 FY 08/09) and an income related employment and support allowance. Since April 2003 the eligibility criteria that entitle families to an exemption from paying for the cost of board and lodging on residential visits have been aligned with free school meals eligibility criteria. The head teacher must inform all parents of the right to claim free board and lodging if they are receiving these benefits.

Q. With regard to the remission of board & lodging payments, can you please explain who pays for the expense, would it come out of the school budget or is there a grant available to claim?

A Although the criteria for being eligible for the remission of charges for board and lodgings is the same as free school meals, that is where the similarity ends. The costs involved in the remission of board and lodgings are to be borne by the school from their contingency funds. There is no return to be completed to re-claim the money back.

Q Our school has a large number of pupils eligible for free school meals, this means that they would also receive remission for board and lodgings expenses for residential school visits. How can the school fund/organize residential visits?

A The government provides funding for schools to each local authority according to a formula which recognises the different needs of each area. The same basic funding is provided for all comparable pupils across the country. This is then topped up according to local needs.

One of these top-ups reflects the numbers of pupils in a certain area living in deprived circumstances, as these pupils need extra help if they are to have an equal opportunity in life. The amount that individual schools receive from the local authority reflects their relative need compared with other local schools, through the locally agreed funding formula. All local authorities' funding formulae are required to include an element to reflect the needs of deprived pupils. It is for head teachers and school governing bodies to decide how to spend their available resources.

Schools cannot exclude children from taking part in an activity that is part of the National Curriculum purely on the grounds that the parent or carer, cannot make, or refuses to

make, a contribution. This can clearly place schools in some difficulty on occasions where a number of parents/carers might be in such a position. The school then has to decide whether they can cover the costs of such activity from within the budget or by fundraising, or whether the activity has to be cancelled.

If there is a residential activity taking place largely during school time, or which meets the requirements of the syllabus for a public examination, or is to do with the National Curriculum or religious education, no charge may be made either for the education or for the cost of travel.

Q Can governing bodies charge for educating children in maintained schools?

A. The local authority or governing body cannot charge for education that takes place in school hours. Nor can they charge for activities that take place outside school hours if these are part of the National Curriculum, necessary as part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education. They can charge for permitted 'optional extras', provided they have drawn up a statement of general policy on charging and given details of 'optional extras' they intend to charge for. The governing body's policy does not have to be the same as the local authority's policy, as long as it meets the requirements of the law.

Q Can a school charge for an activity that takes place out of school hours?

A. This kind of activity is often referred to as an 'optional extra'. Where an optional extra is being provided, a charge can be made for providing materials, books, instruments, or equipment. See guidance on optional extras.

The actual charge for the optional extra cannot exceed the actual cost of the provision. Schools cannot and must not make a profit from charging for optional extras. Participation in any optional extra activity will be on the basis of parental choice and a willingness to meet the charges. Parental agreement is therefore a necessary pre-requisite for the provision of an optional extra where charges will be made.

Q Can a school ask parents for voluntary contributions?

A. Schools may invite parents and others to make voluntary contributions to make school funds go further. All requests to parents for voluntary contributions must make it quite clear that the contributions would be voluntary. It should be remembered that education provided during school hours must be free. This includes materials, equipment, and transport provided in school hours by the local authority or by the school to carry pupils between the school and an activity. Governing bodies should also clearly explain that children of parents who do not contribute will not be treated any differently, and that the activity might be cancelled if insufficient contributions are received.

Q The school has sent letters out to parents asking for contributions towards a school visit, do parents have to pay?

A. Head teachers or governing bodies may ask parents for voluntary contributions towards the cost of:

- any activity which takes place during school hours;
- school equipment; and
- school funds generally.

Children of parents who are unable, or unwilling, to contribute may not be discriminated against. However, if insufficient voluntary contributions are received to cover the cost of the visit, or activity, and there is no alternative method to make up the shortfall, then the school should cancel the activity/visit. It would be advisable to make parents aware of a possible cancellation to the activity/visit if insufficient voluntary contributions are received from the outset.

Q What happens if the school is not able to raise enough voluntary contributions to cover costs?

A. Where there are not enough voluntary contributions, and there is no way to make up the shortfall, for example school funds and/or fundraising activities, then it must be cancelled. The possibility of the activity/visit being cancelled due to a shortfall in contributions should be made clear in the information sent to parents.

Q What if a parent is unable, or unwilling to make a voluntary contribution? How does this affect their child(ren)?

A. The school cannot exclude a child from taking part in an activity that is part of the National Curriculum purely on the grounds that you, the parent or carer, cannot make, or refuses to make a contribution. This can clearly place schools in some difficulty on occasions where a number of parents/carers might be in such a position. The school then has to decide whether they can cover the costs of such activity from within the budget or by fundraising, or whether the activity has to be cancelled.

Q What support can a school offer a parent/carers who has difficulty making a financial contribution?

A. Schools must ensure that parents in receipt of Income Support, Income Based Jobseekers Allowance, support under part VI of the Immigration and Asylum Act 1999, 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 £15,575 (Financial Year 2008/09). Some schools also have funds available to enable families in financial difficulty to send their children on visits/activities. Parents should be encouraged to speak to the head teacher in order to establish if such funding arrangements exist.

No charge may be made if there is a residential activity taking place largely during school time, or which meets the requirements of the syllabus for a public examination. In addition, if the activity is to do with the National Curriculum or religious education, no charge may be made either for the education or for the cost of travel for any pupil, not just those whose parents are in receipt of benefits.

Q What about charges for transport during school hours?

A. Any transport provided by the school in school hours will be provided free of charge if the Academy's mini bus is used and a voluntary contribution could be requested if coaches are required. Guidance on school travel and transport is available [here](#).

Q Can the school charge for something like cooking ingredients or materials needed for a technology lesson?

A. The school can make a charge to cover the costs of materials/ingredients for subjects such as design or food technology where parents have indicated in advance that they would like their child to bring home the finished product.

Q Can the school charge entry fees for examinations?

A. An examination entry fee may be charged to parents if:

- the examination is on the set list, but the pupil was not prepared for it at the school;
- the examination is not on the set list but the school arranges for the pupil to take it; and
- a pupil fails without good reason to complete the requirements of any public examination where the governing body or LA originally paid or agreed to pay the entry fee.

Q. Can a school make a charge to pay for the administration required as part of the admission process?

A. Para 1.82 of the current School Admissions Code and para 1.93 of the revised School Admissions Code (which comes into force in February 2009) rules out practices that can lead to covert selection, such as asking parents for a financial contribution as a condition of entry. We are clear that schools cannot ask for a voluntary contribution as part of the admissions process and where this is found, we will not tolerate it. Legislation prevents maintained schools from charging fees for admission or for providing education during school hours.

Q. Can a school ask for a direct debit to the school fund?

A. No. A school may ask for voluntary contributions, as long as it is clear that they are voluntary, but we are clear that state education should be free and we have no intention of changing this policy. We will not tolerate this when it is brought to our notice. No contributions may be sought as part of the admissions process.

Appendix C

The Policy Updates and Implementation are the responsibility of the following people:

Monkwood Primary Academy:
Ms Kay Sherburn, Head Teacher