

# Charging & Remission Policy (2021)

*To be reviewed Autumn Term 2022*



## 1. Rationale and Aim

The aim of this policy is to outline BEST's policy for charges to pupils/students for supplies or services. It also outlines eligibility for remission of charges.

## 2. Policy

This policy has been based on the guidance provided by the Department for Education 'Charging for School Activities', May 2018.

### Legal requirements

Sections 449-462 of the Education Act 1996 sets out the law on charging for school activities in schools maintained by local authorities in England. Academies are required through their funding agreement to comply with the law on charging for school activities.

BEST academies **cannot** charge for:

- an admission application to any state funded school - paragraph 1.9 (n) of the 'School Admissions Code 2012' rules out requests for financial contributions as any part of the admissions process;
- 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/student is being prepared for at the school, or part of religious education;
- instrumental or vocal tuition, for pupils/students learning individually or in groups, unless the tuition is provided at the request of the pupil/student's parent;
- entry for a prescribed public examination, if the pupil/student has been prepared for it at the school; and
- examination re-sit(s) if the pupil/student is being prepared for the re-sit(s) at the school (however, if a pupil/student fails, without good reason, to meet any examination requirement for a syllabus, the fee can be recovered from the pupil/student's parents).

BEST academies **can** charge for:

- any materials, books, instruments, or equipment, where the child's parent/carer wishes him/her to own them;
- optional extras (listed in section below 'Optional Extras');
- music and vocal tuition, in limited circumstances (see section below 'Music Tuition');
- certain early years provision according to The Education (Charges for Early Years Provision) Regulations 2012;
- community facilities (the powers to provide community facilities are under S.27(1) of the Education Act).

### Optional Extras

Charges may be made for some activities that are known as 'optional extras'. Where an optional extra is being provided, a charge **can** be made for providing materials, books, instruments, or equipment. 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/student is being prepared for at the school; or

- c) part of religious education.
- examination entry fee(s) if the registered pupil/student has not been prepared for the examination(s) at the school;
- transport (other than transport that is required to take the pupil/student to school or to other premises where the local authority/governing body have arranged for the pupil/student to be provided with education);
- board and lodging for a pupil/student on a residential visit.
- Extended day services offered to pupils (for example breakfast club, after-school clubs, tea and supervised homework sessions)

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;
- the cost of buildings and accommodation;
- non-teaching staff;
- teaching staff engaged under contracts for services purely to provide an optional extra, this includes supply teachers engaged specifically to provide the optional extra; and
- 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 pupils must not exceed the actual cost of providing the optional extra activity, divided equally by the number of pupils participating. It must not include a compulsory element of subsidy for any other pupils/students wishing to participate in the activity whose parents are unwilling or unable to pay the full charge.

If the activity takes place during school hours the charge will not include the cost of alternative provision for those pupils/students who do not wish to participate. Therefore no charge can be made for supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential visit.

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 prerequisite for the provision of an optional extra where charges will be made.

### **Voluntary Contributions**

BEST may ask parents for voluntary contributions, however, if the activity cannot be funded without voluntary contributions, the trip organiser will make this clear to parents at the outset. The trip organiser will also make it clear to parents that there is no obligation to make any contribution.

BEST will ensure that no child is 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 academy cannot fund it from some other source then it must be cancelled. Academies will make this clear to parents.

For pupils/students entitled to the pupil premium, academies may use that money to support them in trips, equipment and so on. However, this will depend on individual circumstance and is at the discretion of staff with responsibility for pupil premium at each academy.

When making requests for voluntary contributions, BEST will not make parents feel pressurised into paying as it is voluntary and not compulsory, will not send parents colour coded letters as a reminder to make payments and will not send direct debit or standing order mandates when requesting contributions.

## **Music 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.

The Charges for Music Tuition (England) Regulations 2007 set out the circumstances in which charges can be made for tuition in playing a musical instrument, including vocal tuition.

Charges may be made for vocal or instrumental tuition provided either individually, or to groups of any size, provided that the tuition is provided at the request of the pupil/student's parent. Charges will not exceed the cost of the provision, including the cost of the staff who provide the tuition.

The regulations make clear that charging may not be made if the teaching is either an essential part of the national curriculum, or is provided under the first access to the key stage 2 Instrumental and Vocal Tuition Programme. They also make clear that no charge may be made in respect of a pupil who is looked after by a local authority (within the meaning of section 22(I) of the Children Act 1989).

## **Transport**

BEST will not charge for:

- transporting registered pupils to or from the academy premises, where the local education authority has a statutory obligation to provide transport;
- transporting registered pupils to other premises where the governing body has arranged for pupils to be educated;
- transport that enables a pupil to meet an examination requirement when he has been prepared for that examination at the academy;
- transport provided in connection with an educational visit.

## **Residential Visits**

BEST 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 as part of religious education; and
- supply teachers to cover for those who are absent from school accompanying pupils on a residential visit.

BEST may charge for board and lodging but the charge must not exceed the actual cost.

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

- Income Support
- Income Based Jobseekers Allowance
- Income-related Employment and Support Allowance
- support under part VI of the Immigration and Asylum Act 1999
- the guarantee element of Pension Credit
- Child Tax Credit (provided you're 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 you stop qualifying for Working Tax Credit
- Universal Credit

### **Education partly during school hours**

If 50% or more of the time spent on the activity occurs during school hours, it is deemed to take place during school hours. Time spent on travel counts in this calculation if the travel itself occurs during school hours. School hours do not include the break in the middle of the day.

If less than 50% of the time spent on an activity falls during school hours, it is deemed to have taken place outside school hours.

BEST will only charge for an 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.

Examples of this can found in the Department for Education guidance document ‘Charging for School Activities’.

### **Community facilities**

BEST may allow the community to use academy facilities out of school hours (Samuel Whitbread site under PFI contract). BEST may charge for the use of these facilities. Any profit generated will be used for the purposes of the academies and/or on community facilities and to pay charges arising from the PFI provider.

## **3. Procedure**

For guidance on arranging school activities refer to the Charging and Remission Flow Chart (appendix A) and Which Category of Visit Flow Chart (appendix B). BEST template letters (appendix C) should be used for all activities.

Activities will fall under three categories:

- Necessary educational visits (form part of National Curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or as part of religious education);
- Educational visit (a visit which will enhance a pupil/student’s education but is not a necessary part of the national curriculum or prescribed public examination that a pupil/student is being prepared for);
- School trip (is organised for the enjoyment and expanding cultural/sporting horizons of children).

The trip organiser/group leader must determine which category the activity falls under at the pre-application stage. The local ‘approving body’ (some academies have a Trip Committee) can challenge and re-categorise activities as they see fit.

### **Links to other policies:**

Educational Visits & Journeys  
Pupil Premium

## **4. Monitoring and Evaluation**

The local approving body in each academy will monitor the activities arranged and approve as appropriate taking consideration the timing during the academy year, the category of trip it falls under and the cost to the academy. Academy Principals will ensure that their budgets allow for the cost of school activities and the trip organiser will monitor the cost of each activity.

## **5. Implementation and Review**

This policy will be made known to all staff, parents/carers and governors, and published on the academies websites. Copies are also available upon request from the academy office. This policy will be reviewed annually or as required.

## **6. Author and Date**

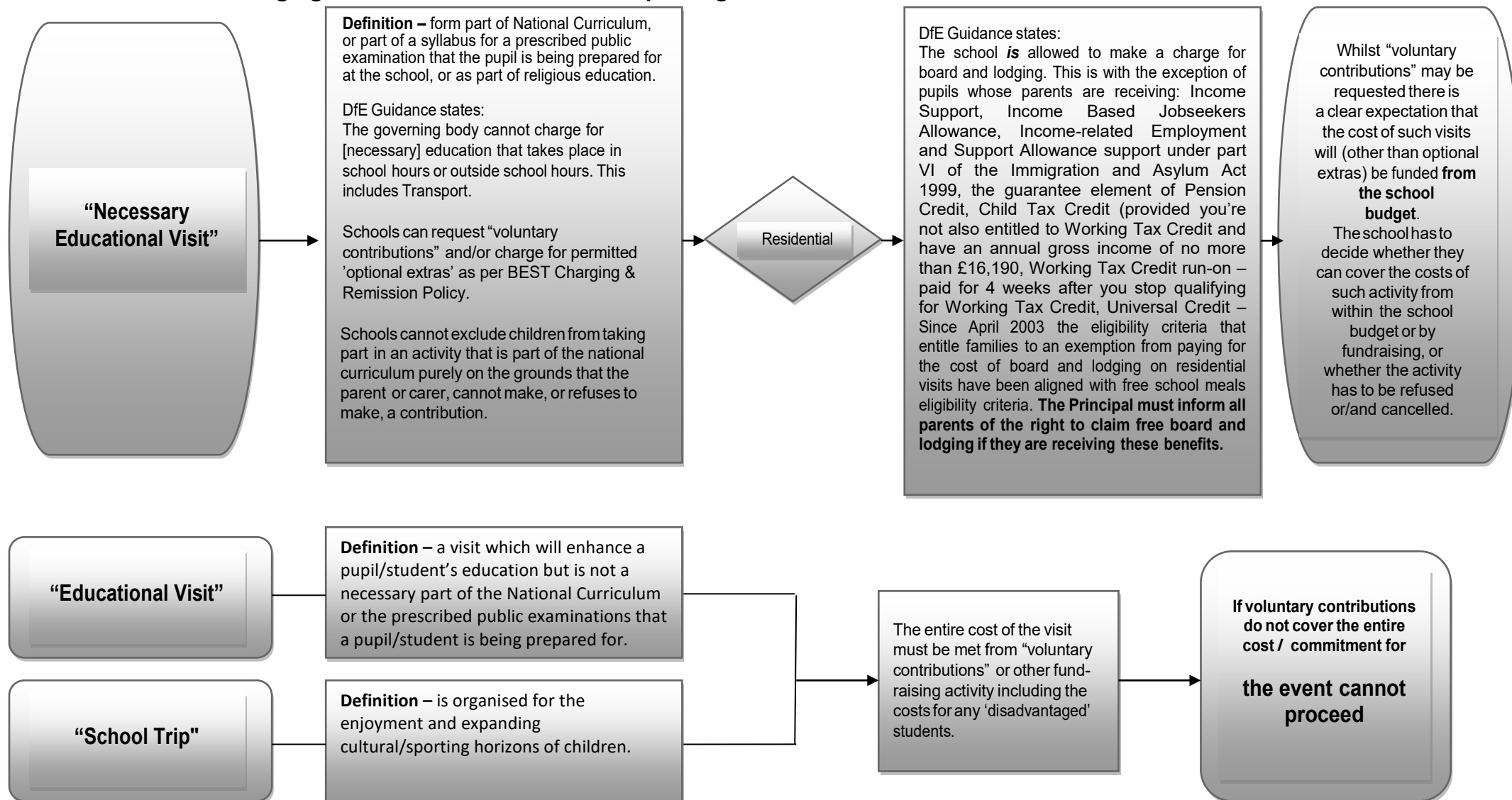
Policy originally drafted by L. Little from DfE guidance document in 2014.

N. Baust updates the policy annually. Last reviewed and approved by the Finance and Audit Committee in February 2021.

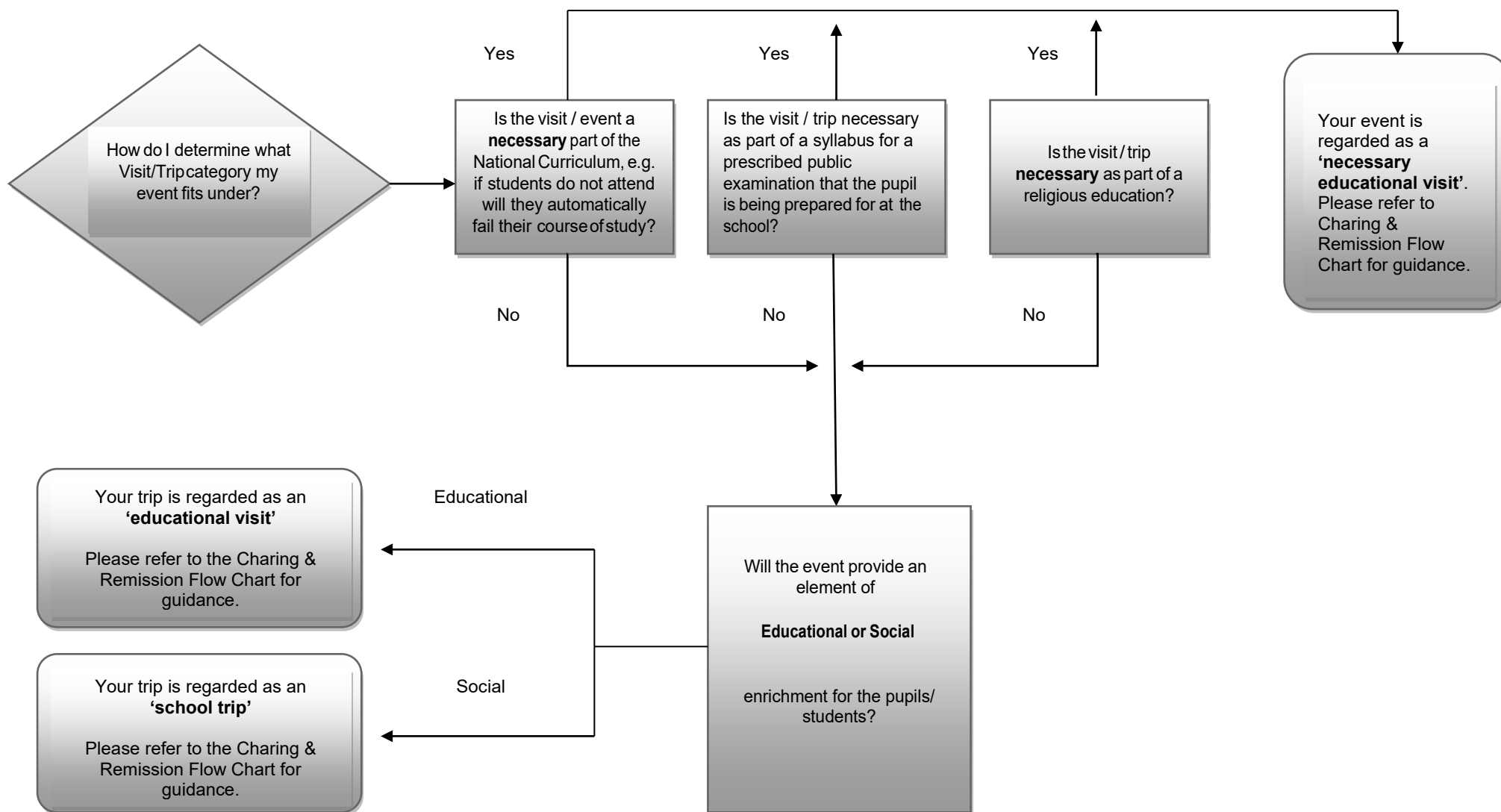
## **7. Appendices**

Appendix A	Charging & Remission Flow Chart – Trip Categorisation Guidance for Staff
Appendix B	Which Category of Visit Flow Chart
Appendix C	Template letters

## APPENDIX A – Charging & Remission Flow Chart – Trip Categorisation Guidance for Staff



## APPENDIX B – Which Category of Visit Flow Chart



## APPENDIX C – Template letters

### **Template for Optional Educational Visits or School Trips (to be on headed paper)**

Dear Parent/Carers

Remember to give detail in the letter of:

- Activity
- Date
- Times
- Transport
- Residence if applicable
- Staff attending if appropriate
- Places available if applicable
- What they need to bring/wear

The cost of (**give details of charge break down i.e. entrance, transport, board/lodgings etc**) is **enter cost**. This is a voluntary donation but if we do not receive enough donations the trip will not go ahead. If you find it difficult to pay for this activity, please speak to **enter details of contact**. Further information concerning assistance available is detailed in BEST's Charging & Remission Policy, which can be found on the academy website or hard copies are available from the academy.

Please complete the permission slip below and return to **enter details** as soon as possible. Cheques should be made payable to **enter details**.

Yours sincerely

**Enter activity contact name, position and contact details**

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I give permission for my child \_\_\_\_\_ Class/Tutor Group \_\_\_\_\_

To go to **enter activity**, on **enter date**  
I enclose **enter cost**, towards the cost of the activity.

My emergency contact no. on the day is \_\_\_\_\_ Signed \_\_\_\_\_



## APPENDIX C – Template letters

### **Template for Necessary Educational Visits**

Dear Parent/Carers

Remember to give detail in the letter of:

- Activity
- Date
- Times
- Transport
- Residence if applicable
- Staff attending if appropriate
- Places available if applicable
- What they need to bring/wear
- Who/where to return reply slip to and by what date

This trip is classified within BEST as a 'necessary educational trip', which means it is essential to your child's studies. The academy will endeavour to fund as many necessary educational trips as possible but would ask for a voluntary contribution of (**enter cost**). This covers (**give details of charge break down i.e. entrance, transport, board/lodgings etc**) is **enter cost**.

Further information concerning charges for academy activities and funding available for trips is detailed in BEST's Charging & Remission Policy, which can be found on the academy website or hard copies are available from the academy.

Please complete the permission slip below and return to **enter details** as soon as possible. Cheques should be made payable to **enter details**.

Yours sincerely

***Enter activity contact name, position and contact details***

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I give permission for my child \_\_\_\_\_ Class/Tutor Group \_\_\_\_\_

To go to **enter activity**, on **enter date**  
I enclose **enter cost**, towards the cost of the activity.

My emergency contact no. on the day is \_\_\_\_\_ Signed \_\_\_\_\_