



Charging and Remissions Policy

Policy Group:	Resources
Policy Ref:	RES/08
Responsible Reviewing Officer and Job Title:	Emma Oldale Chief Finance and Operating Officer
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1. Introduction

- a. Pickwick Academy Trust is committed to ensuring equal opportunities for all pupils, regardless of financial circumstances, and has established the following policy and procedures to ensure that no child is discriminated against by our offering of school trips, activities and educational extras. In addition, we are committed to adhering to legal requirements regarding charging for school activities, and meeting all statutory guidance provided by the DfE.
- b. This policy is based on advice from the Department for Education (DfE) on [charging for school activities](#) and [the Education Act 1996](#), sections 449 to 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.
- c. No charges can be made unless a school has a clear Charging and Remissions policy.
- d. This policy complies with our funding agreement and articles of association.
- a. All members, trustees, local governors, staff and/or any other representative of the trust should be aware of the policy and its requirements.

2. Definitions

- a. A Charge is a fee payable for a specifically defined activity.
- b. A Remission is the cancellation of a charge which would normally be payable.

3. Purpose and Scope

- a. The aim of this policy is to give clear guidance in respect of charging and remissions for activities across all trust schools.
- b. This policy sets out the types of activity that can be charged for and when charges will and will not be made.
- c. By creating this policy, the trust aims to offer a range of activities and visits whilst minimising the financial barriers that may prevent some pupils from taking full advantage of these opportunities.

4. Responsibilities and Accountabilities

- The Trust Board is responsible for:
 - ensuring that the trust funds are used in accordance with the Academies Financial Handbook and the trust Funding Agreement, ensuring that it pays due regard to propriety and regularity.
 - reviewing and approving this policy.
- The CEO is responsible for:
 - the broadcast of this policy across the Trust
- The Chief Finance and Operating Officer is responsible for:

- Providing oversight and guidance to schools in relation to this policy.
- Directors of Education and Headteachers are responsible for:
 - ensuring the implementation of the policy in each of the Trust schools and ensuring that all staff are familiar and comfortable with the contents of the policy.
 - Where possible publishing a list of trips at the beginning of the school year along with their approximate costs
 - Providing the opportunity for parents/ carers to pay for trips in installments
- All Trust Staff are responsible for:
 - Implementing the charging and remissions policy consistently
 - Notifying the Headteacher at their school of any specific circumstances that they are unsure about or where they are not certain if the policy applies
- Parents and carers
 - Are expected to notify staff or the Headteacher of any concerns or queries in relation to the Charging and Remissions policy.

5. Charging for Education

- a. Schools within the trust will not charge parents and carers for the following in relation to 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 pupil is being prepared for at the school
 - Religious education
 - Instrumental or vocal tuition, for pupils learning individually or in groups, unless the tuition is provided at the request of the pupil's parent/carers
 - 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
- b. Schools within the trust reserve the right to charge parents and carers for the following:

- Any materials, books, instruments or equipment, where the child's parent/carer wishes the child to own them
- Music and vocal tuition, in limited circumstances (see section 6)
- Optional extras (see section 9)
- Certain early years provision. Parents can expect to pay for any meals offered by the provider alongside their free entitlement. Parents can also expect to pay for other consumables or additional activities offered by the provider, such as nappies or trips.
- Use of Community facilities
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school **and** the pupil fails, without good reason, to meet any examination requirement for a syllabus.
- Provision of information within the scope of freedom of information.

6. Charging for Music tuition

- Schools within the Trust reserve the right to charge for 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/carer.
 - Charges may not exceed the cost of the provision, including the cost of the staff giving the tuition.
 - Schools within the trust will not charge:
 - 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 pupil who is looked after by a local authority

7. Charging for Transport

- Schools within the Trust will not charge for the following:
 - 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 governing body or local authority 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 school

- transport provided in connection with an educational visit (although a voluntary contribution could be requested, see section 10)
- b. Schools within the Trust reserve the right to charge for Transport, other than that listed above.

8. Charging for Residential Visits

- a. Schools within the Trust will not charge for:
- education provided on any visit that takes place during school hours (although a voluntary contribution could be requested, see section 10)
 - 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
- b. Schools within the trust reserve the right to charge for:
- board and lodging on residential visits but the charge must not exceed the actual cost.
- Parents will be exempt from board and lodging costs if they can prove they are in receipt of one or more of the benefits listed in section 12.**

9. Optional Extras

Schools within the Trust reserve the right to charge for activities known as 'optional extras'.

- a. In these cases, a school can charge for providing materials, books, instruments or equipment. The following are classified as 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 pupil is being prepared for at the school
 - Religious Education
 - Examination entry fees of the registered pupil has not been prepared for examination at the school
 - Extended day services offered to pupils (such as breakfast clubs, after-school clubs tea and supervised homework sessions).
 - Transport, other than that arranged by the LA for the pupil to be provided with education
- b. 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 (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
- c. Any charge made in respect of individual pupils will not be greater than the actual cost of providing the optional extra activity, divided by the number of pupils participating.
 - d. Any charge will not include an element of subsidy for any other pupils who wish to take part in the activity but whose parents/carers are unwilling or unable to pay the full charge.
 - e. 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.
 - f. The school will not charge for supply costs to cover for teachers who are absent from school accompanying those on a residential visit.
 - g. Parental agreement is necessary for the provision of an optional extra that is to be charged for.

10. Voluntary contributions

- a. As an exception to the requirements set out above, Trust schools are able to ask for voluntary contributions from parents/carers to fund activities that would not otherwise be possible.
- b. Some activities for which the school may ask parents/carers for voluntary contributions include school trips or sports activities.
- c. **All requests for voluntary contributions by schools will highlight that there is no obligation for parents/carers to make any contribution, and no child will be excluded from an activity if their parents/carers are unwilling or unable to pay.**
- d. If a school is unable to raise enough funds for an activity or visit then it will be cancelled.

11. Damaged or Lost Items

- a. The school may charge for the cost of replacing items that are damaged or lost due to the negligence or poor behaviour of pupils or their parents. Parents will only be charged the replacement cost to purchase the same or equivalent item. The school will consider waiving costs in exceptional circumstances, e.g., financial hardship

12. Remissions

- a. To remove financial barriers from disadvantaged pupils, the Trust has agreed that some activities and visits where charges can legally be made, as stipulated in this policy may be offered at no charge or a reduced charge to parents in particular circumstances as detailed below. Parents and carers should refer to their own

school for clarification and should provide relevant evidence of their individual financial circumstances to the school office.

- b. This remissions policy sets out the circumstances in which such charges will be waived.
- Families will qualify for remission or help with charges if they are in receipt of pupil premium and/or currently in receipt of free school meals due to receiving the following benefits:
 - income support including pension credit for over 60's
 - income-based Jobseekers Allowance
 - support under part VI of the Immigration and Asylum Act 1999
 - Child Tax Credit, (but not working tax credit) and who have a yearly annual gross income of no more than £16,190
 - an income related employment and support allowance
 - Working Tax Credit run-on - paid for 4 weeks after you stop qualifying for Working Tax Credit
 - Universal Credit - if you apply on or after 1 April 2018 your household income must be less than £7,400 a year (after tax and not including any benefits you get)
 - Additional categories of parents may claim help with some costs in the following circumstances:
 - specific individual circumstances that have caused temporary hardship
 - recently moved into hardship but not yet receiving the benefits mentioned above
 - made a specific request to the Headteacher for any other justifiable reason. The remission is at the Headteacher's discretion in these circumstances based on any evidence provided

13. Equal Opportunities

An Equality and Diversity Impact Assessment has been completed in order to ensure it complies with equality obligations outlined in discrimination legislation. The policy positively reflects the aims and ambitions of Pickwick Academy Trust.

14. Legislation and Guidance

- **Education Act 1996**
- **DfE Charging for School Activities guidance**