



CHARGING AND REMISSIONS POLICY

Last Review:	October 2013
Committee:	F&GP
Date Ratified:	June 2018
Next Review:	July 2020

1. Purpose

Oldfield School's ethos has always been the same;

- to provide an exceptional education
- to provide an environment that challenges all students and fosters ambition
- to inspire, to learn, to succeed

Every young person should experience the world beyond the classroom as an essential part of learning and personal development, whatever their age, ability or circumstances.

As a school we wish to continue to encourage these opportunities and will direct our financial help at those students who may need financial assistance to participate. We want students and parents to continue their support for extra-curricular provision.

Charging Guidance

Academies are required through their funding agreements to comply with the law on charging for school activities.

School governing bodies cannot charge for education provided during school hours (including the supply of any materials, books, instruments or other equipment).

Schools must ensure that they inform parents on low incomes and in receipt of the benefits of the support available to them when being asked for contributions towards the cost of school visits.

Education

What you **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 is being prepared for at the school, or part of 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;
- entry for a prescribed public examination, if the pupil has been prepared for it at the school; and
- examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school

Schools **can** charge for:

- any materials, books, instruments, or equipment, where the child's parent wishes him/her to own them;
- optional extras (see page below);
- music and vocal tuition, in limited circumstances
- certain early years provision
- community facilities

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 is being prepared for at the school;

or

- c) part of religious education.
- examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school;
- transport (other than transport that is required to take the pupil to school or to other premises where the governing body have arranged for the pupil to be provided with education);
- board and lodging for a pupil 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 therefore include an element of subsidy for any other pupils wishing to participate in the activity whose parents are unwilling or unable to pay

Furthermore, 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. 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 pre-requisite for the provision of an optional extra where charges will be made.

Voluntary contributions

- Nothing in legislation prevents a school governing body from asking for voluntary contributions for the benefit of the school or any school activities. However, if the activity cannot be funded without voluntary contributions, the governing body or head teacher should make this clear to parents at the outset.

- The governing body or head teacher must also make it clear to parents that there is no obligation to make any contribution.
- It is important to note that no child should be 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 school cannot fund it from some other source, then it must be cancelled. Schools must ensure that they make this clear to parents. If a parent is unwilling or unable to pay, their child must still be given an equal chance to go on the visit. Schools should make it clear to parents at the outset what their policy for allocating places on school visits will be.
- When making requests for voluntary contributions, parents must not be made to feel pressurised into paying as it is voluntary and not compulsory. Schools should avoid sending colour coded letters to parents as a reminder to make payments and direct debit or standing order mandates should not be sent to parents 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. They allow charging for tuition in larger groups than was previously the case.
- Charges may now 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's parent. Charges may 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(l) of the Children Act 1989).

Transport

Schools **cannot** charge for:

- 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; and
- transport provided in connection with an educational visit.

Charging and remissions policies

No charges can be made unless the governing body of the school has drawn up a charging policy giving details of the optional extras or board and lodging that they intend to charge for, and a remissions policy.

- The governing body's policy may be more or less generous than the local authority's, as long as it meets the requirements of the law. A policy statement will take account of each type of activity that can be charged for and explain when charges will be made.
- If a charge is to be made for a particular type of activity, for example optional extras, parents need to know how the charge will be worked out and who might qualify for help with the cost (or even get it free). This information should be made available to parents.
- The remissions policy must set out any circumstances in which the school or local authority propose to remit (wholly or partly) any charge which would otherwise be payable to them in accordance with their charging policy. For example, a school may decide to provide an Italian language evening class as an optional extra. The governing body may decide to reduce the cost for those children whose parents are in receipt of certain benefits.

Residential visits

Schools **cannot** 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 part of religious education;
- supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential visit.

Schools **can** charge for:

- board and lodging and the charge must not exceed the actual cost.
- When a school informs parents about a forthcoming visit, they should make it clear that parents who can prove they are in receipt of the following benefits will be eligible for financial support:
 - Universal Credit in prescribed circumstances;
 - Income Support (IS);
 - Income Based Jobseekers Allowance (IBJSA);
 - 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 £16,105(financial year 2016/17);
 - the guarantee element of State Pension Credit;
 - an income related employment and support allowance that was introduced on 27 October 2008.

Oldfield School Charging & Remissions Procedures

Parents cannot be asked to **pay** for activities which take place during, or largely during, the school day. However, if the activity cannot be funded without voluntary contributions, the governing body or head teacher should make this clear to parents at the outset.

Procedures

- For visits/activities, teachers must check that the letter to parents uses the correct form of wording, i.e. is it appropriate to 'charge' or ask for 'voluntary contributions'? The wording for this needs to be agreed by the Headteacher in advance of the letter being sent home.
- Letters seeking voluntary contributions must make it clear that there is no obligation to contribute, however, if insufficient contributions are received, the activity may need to be cancelled by the school.
- Letters regarding both charges and voluntary contributions should include information about the financial help available in cases of hardship.
- For subsidies granted to eligible students, amounts will be made available to the Finance Department who can then offset these against the cost of the trips, on the ParentPay system.
- In all cases it is expected that a payment payable to Oldfield School is made in line with published deadlines.
- Cash payments may be acceptable in exceptional circumstances.
- It is not acceptable to use departmental budgets to make up a shortfall caused by not collecting in the money for an activity.

Monitoring

- The Trips and Visits Coordinator must check letters are appropriately worded with regard to charging and remissions.
- The Headteacher, via normal monitoring of all letters, will check that procedures are being followed. The Headteacher will deal with requests for financial subsidies from parents.

- The Finance and Facilities monitors that teachers are using the correct forms to ensure payments are made correctly and will monitor the use of the remissions budget.

Evaluation

- Evidence will be collected from those organising visits/activities to judge whether students' participation is being facilitated.
- The Finance and Facilities Manager will liaise with the Trips and Visits Coordinator to assess whether teachers are following the correct procedures to enable the facilitation of trips and for the school to collect the contributions.
- These judgements will be reported to the Finance & General Purposes of the Governing Body

REFUNDING PLACES ON SCHOOL TRIPS

In the event that a student is no longer willing/able to take part in a school trip after payment has been made, the following procedure will be followed:

- If the school is able to fill the place with another student who wishes to take part, there will be a full refund.
- If the school is not able to fill the place with another student, the school will only be able to refund any monies that we are able to secure from the provider.

Places on residential trips are subject to maintaining good behaviour in school. In the event that a student has a fixed term exclusion from school, any places they have secured on residential trips will be withdrawn. If the school is able to fill the place with another student who wishes to take part, there will be a full refund. If the school is not able to fill the place with another student, the school will refund all monies paid, with the exception of the non-refundable deposit.

This information is shared with parents in the initial letter regarding all residential trips.

In the event that a trip has to be cancelled and this falls outside the school's insurance cover (for example terrorist activity) the school may refund parents for the cost of the trip.

CHARGEABLE ACTIVITIES DURING SCHOOL HOURS

Parents may be asked to pay (partially or fully) or make a voluntary contribution (as appropriate) for:

- a. individual/group music tuition
- b. the board and lodging element of all residential trips and visits except in the case of students whose parents are receiving specific benefits as outlined in Section 1. This is at the Headteachers discretion based on parental application
- c. the cost of transport
- d. the cost of ingredients or materials if they have indicated in advance that they wish to own the finished product
- e. the cost of entrance to museums, exhibitions, etc.
- f. the cost of tickets to attend a conference/lecture
- g. the cost of activities during Cross Curricular Week

CHARGEABLE EXTRA-CURRICULAR ACTIVITIES

Parents will be asked to pay for:

- a. activities/lessons, where they take place outside of the normal timetabled time (at an extra cost to the school)
- b. 'optional extras', such as an evening theatre visit
- c. social or recreational activities, such as discos/ice skating visits
- d. outdoor educational activities such as the Duke of Edinburgh award /World Challenge expedition
- e. materials required for a particular course which takes place outside of normal timetabled time

Where the school is able to allocate funds allocated for cases of financial hardship to support extended school activities we will do so.

CHARGES FOR PUBLIC EXAMS

Parents will be asked to pay for:

- a. examination entries where the school has not prepared the student for a prescribed examination in that academic year.
- b. entry for non-prescribed examinations. This will include the cost of invigilation if there are no other examinations taking place at the same time.
- c. the cost of rescrutiny or re-mark of examination papers where they request it.
- d. the recovery of entry fees where, without good or reasonable cause, the student fails to attend for an examination or otherwise fails to meet the examination requirement.
- e. module re-takes at the time of submitting the re-take entries.

External candidates will be asked to pay for the examination entry fee and the cost of invigilation if there are no school candidates for the examination subject.

CHARGES FOR DAMAGE OR LOSS

Parents will be required to reimburse the school for:

- Damage to the fabric or the property of the school for which their child is responsible, loss of textbooks, library books or other school property. Reasonable charges will be determined by the Headteacher, or in the case of vandalism, determined from Supplier quotes to carry out repair works.

VOLUNTARY CONTRIBUTIONS STATEMENT

In order that the visit/activity may take place, it is necessary to ask for a voluntary contribution of £ per student. There is no obligation to contribute, and no student will be omitted from the activity if their parents do not contribute. It is also true, however, that the visit/activity will not take place if sufficient voluntary contributions are not forthcoming as there is no other source of funding

FINANCIAL HELP STATEMENT

In cases of hardship, support may be available from the school and a letter or telephone call to the Headteacher will be dealt with confidentially and sympathetically. This statement is for school time activities, but not for additional activities at weekends, evenings, holidays, etc.

COMMENTARY FOR STAFF

We must conform to the guidelines as outlined in the Academies Financial Handbook.

- In terms of financial support for residential visits, the school subsidy will be used to support those students whose parents/carers are receiving Income Support, Income based Jobseeker's Allowance, Support under part VI of the Immigration and Asylum Act 1999, Child Tax Credit, (where the parent is not entitled to Working Tax Credit and whose annual income does not exceed £16,105) or Universal Credit.
- This means that the financial support will be targeted to those students who need financial help; all relevant letters regarding visits will need to point out to parents that financial help is available in cases of hardship. Children who receive a qualifying benefit in their own right may seek financial support from the school.

The school will continue to provide cover for those teachers who are accompanying school visits. The level of teacher cover will be expected to be as economical as possible. The school will encourage the use of adults other than teachers, for example, a visit to France for 40 pupils needs a ratio of 1:8, this might mean 2 teachers and 3 support member of staff/trainee teacher or parent.

SCHOOL FUND

This policy applies equally to activities within the School Fund.