

# Charging & Remission Policy

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<b>CLASSIFICATION:</b>	Operational
<b>PURPOSE</b>	Scheme to determine the academy's policy on charging for activities and how this may be carried out
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## **Governing Body of Bridgnorth Endowed School**

### **STATEMENT OF CHARGING AND REMISSIONS POLICY**

#### **Introduction**

The school conforms to current statutory regulations. The Governing Body recognises the valuable contribution that the wide range of additional activities, including trips, clubs and residential experiences can make towards pupils' education. The Governing Body aims to promote and provide such activities both as part of a broad and balance curriculum for the pupils of the school and as additional optional activities. However due to the limited funds in the delegated budget the Governing Body reserves the right to make a charge in the following circumstances for activities organised by the school.

The Education Act 1996 requires the Governing Body to:

“... determine and keep under review a policy with respect to the provision of, and the classes or descriptions of cases in which they propose to make charges for, any optional extra or board and lodging in respect of which charges are permitted by Section 455 ...”

This policy will have consideration for, and be compliant with, the following legislation and statutory guidance:

Education Act 1996

The Charges for Music Tuition (England) Regulations 2007

The Education (Prescribed Public Examinations) (England) Regulations 2010

DfE (2014) 'Charging for School Activities'

DfE (2017) 'Governance Handbook'

#### **Aims**

This policy sets out Bridgnorth Endowed School's attitude to charging, describes each type of activity that will be charged for and explains when charges will be made.

#### **Principles**

All education provided within school hours will 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. School hours are those when the school is actually in session, and do not include the break in the middle of the school day.

The school may invite parents and others from time to time to make a voluntary contribution towards any part of the school's work, and to permit the provision of activities which might not otherwise be possible. Parents will be informed of the decision to ask for contributions at the planning stage of activities. Planned activities may be cancelled if financial support is not forthcoming. No student will be left out of any activity provided in school time because his / her parents cannot or will not make a voluntary contribution.

The governing body have noted that the Education Act 1996 allows charges to be made in the following areas:

Optional extras	activities not related to the National Curriculum or to prescribed public examinations or to fulfil duties relating to religious education taking place out of school time.
Individual Instrumental Tuition	Individual instrumental tuition not related to the National Curriculum or to prescribed public examinations.
Materials used in Craft Subjects	Subject to the parents having agreed in advance they wish to own the finished product.
Board and Lodging Charges	<p>At any time (in school time or otherwise) subject to full remission to those parents in receipt of:</p> <ul style="list-style-type: none"><li>• Income support (IS)</li><li>• Income-based jobseekers allowance (IBJSA)</li><li>• Income-related employment and support allowance (ESA(IR))</li><li>• The guaranteed element of Pension Credit</li><li>• Child tax credit provided you are not receiving work tax credit and you do not have an annual income that exceeds £16,190 (2017) (as assessed by H.M Revenue and Customs) – this amount may vary each year.</li><li>• Support under Part VI of the Immigration and Asylum Act 1999</li><li>• Working Tax Credit run-on-paid for 4 weeks after you stop qualifying for Working Tax Credit</li><li>• Universal Credit</li></ul> <p>for residential visits taking place or deemed to take place in 'school time'.</p>
Examination Entry Fees	Public examinations not prescribed in regulations. Prescribed public examinations where the pupil has not been prepared by the school. Resits or prescribed public examinations where no further preparation has been provided by the school.

The Education Act 1996 does not debar voluntary contributions being made by parents.

The governing body wish to try and ensure that the level of visits and activities established at the school continue but emphasise that this can only happen with their full support and that activities will either be substantially reduced or cease altogether if parents are not prepared to contribute voluntarily.

The governing body note that parents are not debarred from making voluntary contributions towards the costs of board and lodgings if they so wish in any situation, including those in receipt of Income Support, Income-based Jobseeker's Allowance, support under part IV of the Immigrant and Asylum Act 1999, or Child Tax Credit, providing the annual family income does not exceed £16,190.

The governing body notes that the Education Act 1996 prescribes:

- That no charges may be levied for school activities taking place or deemed to take place in school time;
- That voluntary contributions must be genuinely voluntary;
- That there is no obligation on parents to contribute; and
- That pupils will not be treated differently according to whether or not their parents have made any contributions.

The governing body recognises that \* in general, participation in all trips and visits is voluntary and notwithstanding the charging requirement parents have the right, for whatever other reasons, to choose that their children not participate.

- Should participation in any trip be essential for the fulfilling of the school's duties relates to the National Curriculum, public examinations or the provision of religious education, parents will be so informed on the occasion of each trip. In these cases, the full cost of the trip will be met by the school, less any voluntary contribution parents may be prepared to make.

The Charging and Remissions Policy for Bridgnorth Endowed School will, for the time being be as follows:

- i. The governors reserve the right to make charges where the law allows and as set out with the Principles section on page 2.
- ii. Individual instrumental tuition able to be accommodated at the wishes of parents will be on the understanding that parents meet the full costs involved.
- iii. From time to time it may be possible for the costs of trips and activities to be subsidised either wholly or in part from private school funds. Parents will be so informed when these occasions arise.
- iv. Should the governing body choose to hold "in school time" residential visits at some other venue, remission of board and lodging costs will be provided by the school to those who are entitled and who claim.
- v. The governing body have instructed the Headteacher to include in the school's disciplinary code that parents will be asked to meet or contribute towards the costs of damage to or loss of school property arising out of individual pupil's behaviour.

### **Monitoring and Review**

This policy statement will be reviewed on a bi-annual basis by the governing body's Finance Committee and will be adjusted in line with any subsequent guidelines from the Department for Education.

Monitoring of the policy will be carried out throughout the year by the Director of Business & Finance and any notes will be made and commented on at the review period.

## CHARGING FOR SCHOOL ACTIVITIES GUIDANCE

### Education

School governing bodies and local authorities **cannot** charge for:

- An admission application to any maintained school;
- 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; and
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school<sup>1</sup>.

Schools can charge for:

- Any materials, books, instruments, or equipment, where the child's parent wishes him to own them;
- Optional extras (see below) ; and
- Music and vocal tuition.

### 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;

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<sup>1</sup> However, if a pupil fails, without good reason, to meet any examination requirement for a syllabus, the fee can be recovered from the pupil's parents.

- 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 that is not required to take the pupil to school or to other premises where the local authority/governing body have arranged for the pupil to be provided with education; and
  - Board and lodging for a pupil on a residential visit.

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 an optional extra;
- 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 a proportion of the costs, for teaching staff employed to provide tuition in playing a musical instrument, 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 the full charge.

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 Headteacher should make this clear to parents at the outset. The governing body or Headteacher **must** also make it clear to parents that there is no obligation to make any contribution.

It is important to note that no child shall 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, then it must be cancelled. Schools must make sure 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 to the school funds, 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 into the school funds. Schools should also ensure that direct debit or standing order mandates are not sent to parents when requesting for contributions.

## Charging for Visits

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; and
- 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 exempt from paying the cost of board and lodging:

- Income support (IS)
- Income-based jobseekers allowance (IBJSA)
- Income-related employment and support allowance (ESA(IR))
- Child tax credit provided you **are not receiving work tax credit** and you do not have an annual income that exceeds £16,190 (2013) (as assessed by H.M Revenue and Customs).
- Support under part VI of the Immigration and Asylum Act 1999
- The guarantee element of state pension credit
- Universal Credit

### **All Visits**

The group leader should always ensure that parents are notified as early as possible as to:

- The total cost of the visit;
- How much of the cost will come from other funds;
- How much each parents will need to pay or be asked to contribute towards the cost of the visit;
- How much spending / pocket money pupils will reasonably need (especially important for trips which involve a residential element);

Early notification of the above is important as this allows parents to make financial preparations. Many parents find it helpful to gauge the value of the visit if they have information relating to the constituent costs of the visit, i.e. transport, accommodation, food, etc.

Please refer to the flow chart attached (appendix 1) for clarity of what can be charged.

### **During Normal School Hours**

In all schools, visits which occur during school hours must be provided free of charge. However, parents can be asked to make a voluntary contribution towards the cost of the trip. In reality the value of the requested contributions equates to the total cost of the visit and therefore if insufficient voluntary contributions are forthcoming the visit may have to be cancelled – parents must be notified of this contingency. Pupils whose parents / guardians do not contribute cannot be discriminated against.

For residential visits during normal school hours actual costs only must be charged for Board and Lodging.

There is no limit to the level of voluntary contributions which parents or others can make to school activities nor is there any restriction placed on the use of such contributions. A request for a contribution towards the cost of a particular activity

could include the cost of subsidising pupils from low income families or the participation costs (travel etc) of accompanying teachers.

### **Outside of normal school hours / optional extras**

The school can charge parents for board and lodging on residential visits as well as the full cost when a visit is deemed to be an 'optional extra'.

An optional extra:

- Falls wholly or mainly outside school hours, i.e. a residential trip during the school holidays is an optional extra.
- Does not form part of the National Curriculum or the statutory requirements for religious education.

The parents' agreement to meet the costs of an optional extra visit before that visit is planned in detail will always be obtained in writing. The stated cost of an optional extra visit must not include an element of subsidy for pupils whose families do not meet the full charge. Parental permission should be obtained as follows:

Sample parental declaration. Parents sign a declaration which contains e.g. I understand:

- That current legislation permits the School to ask for the full cost of the visit;
- That current legislation does not require the School to arrange subsidies for the visit;
- That if insufficient numbers of pupils opt for the visit then the visit may have to be cancelled;
- That my child cannot attend this 'optional extra' visit if full payment is not made by myself / ourselves.

***See Appendix 3 for suggested approach letter to parents.***

### **Transport in a Minibus**

The school minibuses have Section 19 Permits on display within the vehicle. This enables non-profit making organisations to make a charge without having to comply with the full PSV licensing requirements and without the need for the drivers to have PCV (category D1 or D) entitlement. The service must be provided for their own members or for groups of people whom the organisation serves, but must not be available to members of the general public. Any charges must be made on a non-profit basis.

Bridgnorth Endowed School does not intend to make a profit from this charge and so the formula for charging / requesting individual donations is as follows:

Total mileage x rate per mile ÷ number of passengers

The total mileage of any trip can be determined by using a tool e.g. "route finder". The current rate per mile is 75p. This will be reviewed annually.

- For extra curricular trips every passenger will be asked to meet the full cost,
- for curriculum based trips voluntary contributions will be requested
- For representation activities no contributions will be requested

All monies should be collected beforehand along with the consent form.

## **General 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.

## **Music Tuition**

Although the law states that all education provided during school hours must be free, music lessons are an exception to this rule.

The Education and Inspections Act 2006 introduced a regulation-making power which allowed the Department for Children, Schools and Families to specify circumstances where charging can be made for music tuition. The new Regulations, which came into force in September 2007, provide pupils with greater access to vocal and instrumental tuition.

Charges may now be made for teaching either an individual pupil or groups of any appropriate size (provided that the size of the group is based on sound pedagogical principles) to play a musical instrument or to sing. Charges may only be made if the teaching is not an essential part of the National Curriculum or a public examination syllabus being followed by the pupil(s).

As of April 2010 the provision of peripatetic music lessons are charged to the students via Bridgnorth Endowed School.

## **Ingredients / materials / equipment**

The Governing Body reserves the right to charge for ingredients, materials or equipment (or the provision of them by parents) or require them to be provided if the parents have indicated in advance that they wish to own the 'finished product'.

This is particularly relevant for the cost of materials / ingredients for Art, Design & Technology.

### **Broken Equipment (Replacement)**

The Governors will allow the Headteacher to ask pupils and/or their parents to contribute towards the cost of replacement items where these were damaged or broken as a direct result of misconduct on the pupils part. This does not in any way detract from the teaching staff's duty to brief pupils thoroughly and to manage a calm and safe working environment for the pupils.

## **Charging and Remissions Policies**

### **Remissions**

The Governing Body may remit in full or in part the cost of any activity for particular groups of parents, for example, in the case of family hardship. The assistance for this is limited and there is no guarantee that all requests can be met. Assistance will be allocated on a needs basis, and if the full cost of the trip / activity cannot be met through assistance funding and voluntary contributions, the trip / activity will be cancelled.

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

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.

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

Where an activity takes place partly during and partly outside school hours, there is a basis for determining whether it is deemed to take place either inside or outside school hours. However, a charge can only be made for the activity outside of school hours if it is not part of the National Curriculum, not part of a syllabus for a prescribed public examination that the public is being prepared for at the school and not part of religious education.

### **Non-residential activities**

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.

Where less than 50% of the time spent on an activity falls during school hours, it is deemed to have taken place outside of school hours. For example, an excursion might require pupils to leave school an hour before the school day ends, but the activity does not end until late in the evening.

## **Residential Visits**

If the number of school sessions taken up by the visit is equal to or greater than 50% of the number of half days spent on the visit, it is deemed to have taken place during school hours (even if some activities take place late in the evening). Whatever the starting and finishing times of the school day, regulations require that the school day is divided into 2 sessions. A “half day” means any period of 12 hours ending with noon or midnight on any day.

### **Example 1: visit during school hours**

Pupils are away from noon on Wednesday to 9pm on Sunday. This counts as 9 half days including 5 school sessions, so the visit is deemed to have taken place during school hours.

### **Example 2: visit outside school hours**

Pupils are away from school from noon on Thursday until 9pm on Sunday. This counts as 7 half days including 3 school sessions, so the visit is deemed to have taken place outside school hours.

# Appendices

## Appendix 1

