



## **: Charging and Remissions Policy:**

### **Statutory Policy**

*Adapted from Hertfordshire County Council's departmental advice  
for schools*

**Reviewed by Governors: Spring Term 2017**  
**Ratified by Governors: Spring Term 2017**  
**Next Annual Review Date: Spring Term 2018**  
**VERSION 3**

## **Purpose**

We believe that all our pupils should have an equal opportunity to benefit from school activities and visits (curricular and extra-curricular) independent of their parents' / carers' financial means. This charging and remissions policy describes how we will do our best to ensure a good range of visits and activities is offered and, at the same time, try to minimise the financial barriers which may prevent some pupils taking full advantage of the opportunities.

### **1. No charges will be made for**

- 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
- instrumental or vocal tuition, for pupils learning individually or in groups, unless the tuition is provided at the request of the pupil's parents/carers (refer to 2c)
- 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
- supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential trip
- transport provided in connection with an educational trip.

### **2. Activities for which charges may be made**

#### a) Activities outside school hours

Non-residential activities (other than those listed in 1 above) which take place outside school hours, but only if the majority of the time spent on that activity takes place outside school hours (time spent on travel counts in this calculation if the travel itself occurs during school hours).

#### b) Residential activities

Board and lodging costs (but only those costs) of residential trips deemed to take place during school time. However, pupils whose parents/carers are in receipt of certain benefits (see point 3 below) may not be charged for board and lodging costs.

Residential trips deemed to take place outside school time (other than for those activities listed in 1 above).

*Definition Section 451 Education 1996 Act "Is a residential trip in or out of school time?"  
"If the number of school sessions on a residential trip is equal to or greater than 50 percent of the number of half days spent on the trip 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 two sessions. A "half day" means any period of 12 hours ending with noon or midnight on any day."*

When any trip is arranged parents/carers will be notified of the policy for allocating places.

#### c) Music tuition

The cost, or a proportion of the costs, for teaching staff employed to provide tuition in playing a musical instrument or singing, where the Music tuition is an optional extra for an individual pupil or groups of up to four pupils

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/carer. 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).

#### e) Optional Extras

Activities which can be charged for, are regarded as "optional extras " (with the exception of board and lodging for residential trips). Charges will not exceed the actual cost (per pupil) of provision

- education provided outside of school time that is not part of the national curriculum
- transport (other than transport that is 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);
- 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, where a parent wishes their child to own them. For example, a clay model – a charge to cover the cost of the clay.
- the cost of hiring 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 will not exceed the actual cost of providing the optional extra activity, divided equally by the number of pupils participating. It will 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 will include the cost of alternative provision for those pupils who do not wish to participate. Therefore no charge will 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/carer choice and a willingness to meet the charges. Parental/carer agreement is therefore a necessary pre-requisite for the provision of an optional extra where charges will be made.

**Example Illustration Chart**

| <b>Activity or thing which can be charged for</b>  | <b>Notes</b>   | <b>Remitted or help available</b>   |
|--|--|---|
| Charges can be made for any materials, books, instruments, or equipment, where a parent wishes their child to own them | For example, a clay model – a charge to cover the cost of the clay.  |   |
| Charges can be made for music tuition  | The cost, or a proportion of the costs, for teaching staff employed to provide tuition in playing a musical instrument or singing, where the tuition is an optional extra for an individual pupil or groups of up to four pupils |   |
| Charges will be made for the board and lodging component of residential trips  | The charge will not exceed the actual cost   | Remission for those whose parents meet the criteria for qualification for remission (see below) |

### **3. Families qualifying for remission or help with charges**

In order to remove financial barriers from disadvantaged pupils, the governing body has agreed that some activities and visits where charges can legally be made will be offered at no charge or a reduced charge to parents/carers in particular circumstances. This remissions policy sets out the circumstances in which charges will be waived. If remission or help is available in relation to a particular charge it is indicated in the right hand column of the table above.

#### **Criteria for qualification for remission**

When the school informs parents/carers about a forthcoming visit, it will be made clear that parents/carers who can prove they are in receipt of the following benefits will be exempt from paying the cost of board and lodging:

- Universal Credit in prescribed circumstances (The government plans to prescribe the circumstances when Universal Credit is fully rolled out).
- 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 the sum given in the Revenue and Customs rules (eg : £16,190 financial year 2013/14);
- the guarantee element of State Pension Credit;
- an income related employment and support allowance that was introduced on 27 October 2008.

### **4. Voluntary contributions**

Nothing in legislation prevents the school governing body or local authority 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 will make this clear to parents/carers at the outset. The governing body or head teacher will also make it clear to parents/carers 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/carers 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. The School will ensure that this is made clear to parents/carers. If a parent/carer is unwilling or unable to pay, their child will still be given an equal chance to go on the visit. The School will make it clear to parents/carers, at the outset, what the policy for allocating places on school visits will be.

When making requests for voluntary contributions, parents/carers will not be made to feel pressurised into paying, as it is voluntary and not compulsory.

### **5. Refunds, Surpluses and Deficits**

- When an unexpected surplus is made on an activity or trip, the school will consider making a refund in accordance with the guidelines set by HCC. Surpluses will be reimbursed in "round amounts" only and to the lowest £. Where a refund is offered, the accompanying letter will indicate that "a surplus of £x has been made, and that if the parent/carer would like to take advantage of it, they should contact the office by a date

2 weeks in advance. If the school is not contacted by that date, it will be assumed that the refund has been donated to school funds". All refunds will be made in cheque format in order to maintain a clear audit trail. Refunds donated to the school will be transferred to an appropriate budget heading, following approval from the headteacher. Any remaining balance will be transferred to school funds and used to support students on future activities.

- Where an activity results in a deficit, this will be made up from the school's funds
- If an activity or trip is cancelled, refunds will be made as appropriate.

## **6. Additional considerations**

The governing body recognises its responsibility to ensure that the offer of activities and educational visits does not place an unnecessary burden on family finances. To this end we will try to adhere to the following guidelines:

- where possible we shall publish a list of visits (and their approximate cost) at the beginning of the school year so that parents/carers can plan ahead
- we have established a system for parents/carers to pay in instalments
- when an opportunity for a trip arises at short notice it will be possible to arrange to pay by instalments beyond the date of the trip
- we acknowledge that offering opportunities on a "first pay, first served" basis discriminates against pupils from families on lower incomes and we will avoid that method of selection.

## **Arrangements for monitoring and evaluation**

The Finance Committee of the governing body will monitor the impact of this policy by receiving on a termly basis a financial report on those activities which resulted in a shortfall in excess of £100 on charges being levied, the subsidies awarded (without giving names) and the source of those subsidies. It will seek to evaluate the impact of the school's extended services on those children most in need of additional support.

This policy will be reviewed, as delegated by the Governing Body, annually.

**Approved by Governors: 31<sup>st</sup> January 2017**

**Next Review Date: Spring Term 2018**