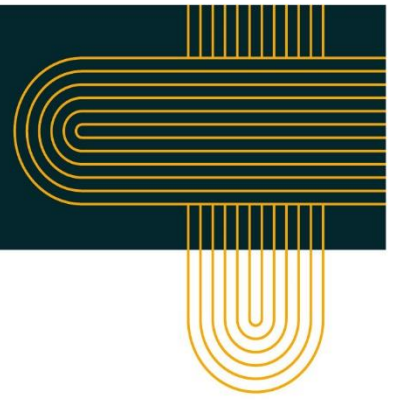




The GORSE Academies Trust

Charging and Remissions Policy

Designated Person:	Chief Financial Officer
Reviewed by:	The Finance Committee of the Trust Board
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1. Aims

This policy aims to ensure that:

- Robust, clear processes are in place for charging and remissions.
- The types of activity that can be charged for and when charges will and will not be made are clearly set out.
- A range of activities and visits can be offered to our pupils, whilst minimising the financial barriers that may prevent some pupils from taking full advantage of these opportunities.

2. Legislation and Guidance

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.

It is also based on guidance from the DfE on statutory policies for schools and academy trusts.

3. Definitions

Establishment:	all the academies and colleges within the trust
Charge:	a fee payable for specifically defined activities
Remission:	the cancellation of a charge which would normally be payable
Voluntary contribution	a request for a financial contribution from parents or carers to fund an activity that would not otherwise be possible, where there is no obligation to contribute, and no pupil is excluded from the activity where a contribution is not made.

4. Roles and Responsibilities

4.1 The trust board

The trust board has overall responsibility for approving the charging and remissions policy but can delegate this in accordance with the scheme of delegation. The trust board also has overall responsibility for monitoring the implementation of this policy.

Responsibility for approving the charging and remissions policy has been delegated to the Finance Committee of the trust board. Monitoring the implementation of this policy has also been delegated to the Finance Committee of the trust board.

4.2 The Principal

Each establishment's Principal is responsible for ensuring staff are familiar with the charging and remissions policy, and that it is being applied consistently. For non-teaching professionals this responsibility falls to the Chief Financial Officer.

4.3 Staff

Staff employed by The GORSE Academies Trust (GORSE) are responsible for:

- Implementing the charging and remissions policy consistently.
- Notifying the Principal of the establishment within which they work of any specific circumstances that they are unsure about or where they are not certain if the policy applies.

The establishment will provide staff with appropriate training in relation to this policy and its implementation.

4.4 Parents and carers

Parents and carers are expected to notify establishment staff or the Principal of any concerns or queries regarding the charging and remissions policy.

5. Where charges **CANNOT** be made

Detailed below are the circumstances in which charges must not be made (please note that voluntary contributions can be requested in these circumstances, please see section 7 for further information):

5.1 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 (academies do not have to follow the National Curriculum but still cannot charge for education that is part of the National Curriculum).
 - A syllabus for a prescribed public examination that the pupil is being prepared for at the establishment.
 - 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 or carer.
- Entry for a prescribed public examination if the pupil has been prepared for it at the establishment.
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the establishment.

5.2 Transport

- Transporting registered pupils to or from the establishment premises, where the local authority (LA) has a statutory obligation to provide transport.
- Transporting registered pupils to other premises where the trust board, local governing body, or LA has arranged for pupils to be educated.
- Transport that enables a pupil to meet an examination requirement when they have been prepared for that examination at the establishment.
- Transport provided in connection with an educational visit.

5.3 Residential visits

- Education provided on any visit that takes place during establishment core hours.
- Education provided on any visit that takes place outside establishment core 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 establishment.
 - Religious education
- Supply teachers, covering for teachers who are absent from school, accompanying pupils on a residential visit.

6. Where charges CAN be made

Detailed below are the circumstances in which charges can be made:

6.1 Education

- Any materials, books, instruments or equipment, where the pupil's parent or carer wishes the child to own them.
- Optional extras (see section 6.2 below).
- Music and vocal tuition, in limited circumstances (see section 6.3 below).
- Certain early years provision.
- Community facilities.
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the establishment and the pupil fails, without good reason, to meet any examination requirement for a syllabus.
- Replacement of items provided by the establishment that have been deliberately damaged or defaced by the pupil.

6.2 Optional extras

Trust establishments are able to charge for activities known as 'optional extras'. In these cases, charges can be made for providing materials, books, instruments or equipment.

The following are classed 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 fee(s) if the registered pupil has not been prepared for the examination(s) at the establishment.
- Transport (other than transport that is required to take the pupil to the establishment or to other premises where the trust board, local governing body, or LA has 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 (such as breakfast clubs, after-school clubs, tea and supervised homework sessions).
- Positive discipline reward trips that are not part of the National Curriculum.

When 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.

Any charge made in respect of individual pupils will not be greater than the actual cost of providing the optional extra activity, divided equally by the number of pupils participating. Any charge will not include an element of subsidy for any other pupils who wish to take part in the activity but whose parents or carers are unwilling or unable to pay the full charge.

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.

Parent or carer agreement is necessary for the provision of an optional extra that is to be charged for.

6.3 Music tuition

The establishment can 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 or carer.

Charges may not exceed the cost of the provision, including the cost of the staff giving the tuition.

Charges cannot be made:

- 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.

6.4 Residential visits

Trust establishments can charge for board and lodging on residential visits, but the charge must not exceed the actual cost.

7. Voluntary contributions

As an exception to the requirements set out in section 5 of this policy above, the establishment can ask for voluntary contributions from parents or carers to fund activities that would not otherwise be possible.

Some activities for which the establishment may ask parents or carers for **voluntary contributions** include:

- Trips arranged for any purpose, including transport, entrance fees, and any other associated costs.
- Sporting activities.
- Cost of materials for example for Design Technology, Food Technology.

There is no obligation for parents or carers to make any contribution, and no pupil will be excluded from an activity if their parent or carer is unwilling or unable to pay. This must be made clear in any communication to parents or carers regarding the voluntary contribution.

If the establishment is unable to raise enough funds for an activity or visit, then it may be cancelled.

8. Activities the trust charge for

The trust establishment may charge for the following activities on a cost recovery basis:

- Breakfast club
- Sports clubs
- After-school clubs

For regular activities, the charges for each activity will be determined by the establishment Principal and reviewed at the beginning of each academic year. Parents and carers will be given sufficient notice in respect of any charges.

9. Remissions

In some circumstances, the establishment may not charge for items or activities set out in sections 6 and 8 of this policy. This will be at the discretion of the Principal and will depend on the activity in question.

9.1 Remissions for residential visits

Parents and carers who can prove they are in receipt of any of the following benefits will be exempt from paying the cost of board and lodging for residential visits:

- Income Support
- Income-based Jobseeker's Allowance
- Income-related Employment and Support Allowance
- Support under part VI of the Immigration and Asylum Act 1999
- The guaranteed 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 – 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)

10. Monitoring arrangements

The Principal of each establishment monitors charges and remissions within that establishment and ensures these comply with this policy.

This policy will be reviewed by the Chief Financial Officer every year and submitted to the Finance Committee of the trust board for approval.

Document control:

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