



The Athelstan Trust

Charging and Remissions Policy

Date of review	Approved by	Date of Approval	Next review	Website
April 2019 July 2022	Board	14 July 2022	July 2025	Y

1. Aims

The Trust aims to:

- Have robust, clear processes in place for charging and remissions
- Clearly set out the types of activity that can be charged for and when charges will and will not be made
- Offer a range of activities and visits whilst minimising the financial barriers that may prevent some students 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's also based on guidance from the DfE on [statutory policies for schools and academy trusts](#).

This policy complies with our funding agreement and articles of association.

3. Definitions

Charge: a fee payable for specifically defined activities

Remission: the cancellation of a charge which would normally be payable

4. Roles and responsibilities

4.1 The governing board

The board of Trustees has overall responsibility for approving the charging and remissions policy but can delegate this to a committee.

The board of trustees also has overall responsibility for monitoring the implementation of this policy.

4.2 Headteachers

The headteacher of each school within the Trust is responsible for ensuring that staff at that school are familiar with the charging and remissions policy, and that it is being applied consistently.

4.3 Staff

Staff are responsible for:

- Implementing the charging and remissions policy consistently
- Notifying the headteacher of any specific circumstances which they are unsure about or where they are not certain if the policy applies

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

4.4 Parents

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

5. Where charges cannot be made

Below we set out what schools within the Trust **cannot** charge for:

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
 - A syllabus for a prescribed public examination that the student is being prepared for at the school
 - Religious education
 - Instrumental or vocal tuition, for students learning individually or in groups, unless the tuition is provided at the request of the student's parent
- Entry for a prescribed public examination if the student has been prepared for it at the school
- Examination re-sit(s) if the student is being prepared for the re-sit(s) at the school

5.2 Transport

- Transporting registered students to or from the school premises, where the local authority has a statutory obligation to provide transport
- Transporting registered students to other premises where the governing board or local authority has arranged for students to be educated
- Transport that enables a student to meet an examination requirement when he or she has been prepared for that examination at the school
- Transport provided in connection with an educational visit

5.3 Residential visits

- 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
 - A syllabus for a prescribed public examination that the student is being prepared for at the school

- Religious education
- Supply teachers, covering for teachers who are absent from school, accompanying students on a residential visit

6. Where charges can be made

Below we set out what schools within the Trust **can** charge for:

6.1 Education

- Any materials, books, instruments or equipment, where the child's parent wishes him or her to own them
- Optional extras (see section 6.2)
- Music and vocal tuition, in limited circumstances (see section 6.3)
- Certain early years provision
- Community facilities
- Examination re-sit(s) if the student is being prepared for the re-sit(s) at the school **and** the student fails, without good reason, to meet any examination requirement for a syllabus

6.2 Optional extras

The schools within the Trust are able to charge for activities known as 'optional extras'. In these cases, schools within the Trust can charge for providing materials, books, instruments or equipment. The following are 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 student is being prepared for at the school
 - Religious education
- Examination entry fee(s) if the registered student has not been prepared for the examination(s) at the school
- Transport (other than transport that is required to take the student to school or to other premises where the local authority or governing board has arranged for the student to be provided with education)
- Board and lodging for a student on a residential visit
- Extended day services offered (such as breakfast clubs, after-school clubs, tea and supervised homework sessions)

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 students will not be greater than the actual cost of providing the optional extra activity, divided equally by the number of students participating.

Any charge will not include an element of subsidy for any other students who wish to take part in the activity but whose parents 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 students who do not wish to participate.

Parental agreement is necessary for the provision of an optional extra which is to be charged for.

6.3 Music tuition

Schools within the Trust can charge for vocal or instrumental tuition provided either individually or to groups of students, provided that the tuition is provided at the request of the student's parent.

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 student who is looked after by a local authority

6.4 Residential visits

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

The Trust recognises its responsibility to ensure that the offer of activities and educational visits does not place an unnecessary burden on parents/guardians' finances. Therefore we will try to adhere to the following guidelines:

- (i) We have established a system for parents/guardians to pay in instalments.
- (ii) Where possible we will publish on the website and in the newsletter a list of intended activities/visits at the beginning of the school year to enable parents/guardians to plan. We acknowledge that offering opportunities on a "first come, first served" basis may disadvantage students from families on lower incomes therefore where visits are oversubscribed names will be selected randomly.

In the event that an activity generates an unexpected surplus the school organising the activity will consider making a refund if the surplus exceeds £5.00 per student for day visits and £10.00 per student for residential visits. Surplus amounting to less than this will be used to support students in the future who may be unable to meet the cost of paying for school activities.

6.5 Non Curricular Activities

Where a non-curricular activity is being offered to students e.g. ski trip, the full cost must be met by the parents/guardians.

Charges for such non-curricular activities will generally include an initial, non-refundable, deposit. This deposit will be to cover external agency charges and internal administration costs incurred in organising the trip. The remaining balance may be paid by regular part payments; however, the full cost of the activity must be paid

before the date of that activity.

If, having signed up to go on a trip, a student changes their mind and withdraws for no good reason; the following action will be taken:

The deposit will be lost but if a replacement is found to go on the trip the balance of the cost will be refunded*. If no replacement is found, there will be no refund.

*It should be noted that airlines charge for name changes on tickets so if part of the cancelled journey involves a flight booking it may not be possible to refund any of this element of the trip.

If, having signed up to go on a trip a student is taken ill or has an injury, it may be possible to claim a refund through the individual school's travel insurance. In such circumstances a Doctor's certificate is required, detailing why the student is unable to travel. If the claim is accepted the refund will be made less the insurance excess.

If your child has a pre-existing medical condition, please check with the individual school to ensure your child is covered by that school's insurance.

Each school within the Trust reserves the right to exclude a student from going on a trip. For example, when a student has misbehaved on a previous trip, or whose general behaviour in lessons and around school has been persistently below the standard expected, and when a student could be seen as a risk to his/her personal safety and the safety of others. In these circumstances all payments that can be recovered will be refunded less an administration fee of £50 (1.5 x Educational Visits Coordinator hourly rate plus on-costs; £2.50 for photocopying/postage). Where fees have been incurred which cannot be recovered (for example for flights/visas and accommodation) the school will not make a refund.

7. Voluntary contributions

As an exception to the requirements set out in section 5 of this policy, the schools within the Trust are able to ask for voluntary contributions from parents when, as part of the curriculum, a visit is organised (either inside or outside normal school hours) which cannot be financed from the Trust's budget. Contributions will be fixed at a level to fully fund the activity.

There is no obligation for parents to make any contribution, and no child will be excluded from an activity if their parents are unwilling or unable to pay.

If the school is unable to raise enough funds for an activity or visit then it will be cancelled.

8. Activities we charge for

The schools within the Trust will charge for providing the following facilities:

- Photocopying for individual use
- Binding of project work
- ICT printing once the student's annual allowance of 50 A4 black and white copies has been exceeded

9. Remissions

In some circumstances, the schools within the Trust 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 school and will depend on the activity in question.

9.1 Remissions for residential visits

Parents 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)