EQUALS TRUST

The Equals Trust
Policy for Charging and Remissions

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Equals Trust
Charging and Remissions Policy

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1. Aims

Equals 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 be made
- Follow guidance set out in the Department for Education publication

The Trust recognises the valuable contribution schools can make to the range of educational experiences offered to their pupils by organising a range of visits and other non-classroom based activities, either inside or outside school hours. The Trust accepts that in these circumstances it may be necessary for a school to seek financial contributions from parents if the expenses of a particular activity cannot wholly be contained from within the funds normally available to the school.

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 449-462 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. 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 Trust Board of Directors

The Trust Board of Directors has overall responsibility for approving the charging and remissions policy and for the monitoring of its' implementation, but can delegate this to the Trust Chief Executive Officer, Head Teacher or functional lead officer.

In our Trust, responsibility for approving the charging and remissions policy and for the monitoring of its' implementation is delegated to the Finance and Audit Committee.

4.2 The Head Teacher / Executive Head
The Head Teacher / Executive Head is responsible for ensuring staff are familiar with the charging and remissions policy, and that it is being applied consistently.

4.3 Staff
Our staff are responsible for:

- Implementing the charging and remissions policy consistently
- Notifying the Head Teacher of any specific circumstances which they are unsure about or wherethey are not certain if the policy applies
- The senior leadership team 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 Head Teacher of any concerns or queries regarding the charging and remissions policy.

5. Things for which we will not charge

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 pupil is being prepared for at the school.
- 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.
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school.

5.2 Transport
Transporting registered pupils to or from the school premises, where the local authority has a statutory obligation to provide transport.
Transporting registered pupils to other premises where the Trust or local authority has arranged for pupils to be educated.
Transport that enables a pupil 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 pupil is being prepared for at the school.
- Religious education.

Supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential visit.

6. Things for which we may charge

6.1 Education

Any materials, books, instruments or equipment, where the child's parent wishes to own them.
Optional extras (see below).
Music and vocal tuition, in limited circumstances.
Certain early years provision.
Community facilities.

6.2 Optional extras

We are able to charge for activities known as 'optional extras'. In these cases, the school 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 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 school.
Transport (other than transport that is required to take the pupil to school or to other premises where the Trust / governing board 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).

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 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.

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

6.3 Music tuition
We may 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.

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
We may charge for board and lodging on residential visits, but the charge will not exceed the actual cost.

7. Voluntary contributions
As an exception to the requirements set out in section 5 of this policy, the Trust is able to ask for voluntary contributions from parents to fund activities during school hours which would not otherwise be possible.

Some activities for which the Trust may ask parents for voluntary contributions include:
- School trips,
- Sporting events, activities, or competitions,
- Musical or theatrical performances,
- Seasonal excursions,
- Any event that would not otherwise be possible without the support of parents and carers through voluntary contributions.

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. However, if the school is unable to raise enough funds for an activity or visit then it may have to be cancelled.

8. Things for which Trust schools will charge:
In the interest of transparency and clarification our schools will charge for:
- Breakfast Clubs (where run by the school),
- After School Clubs (where run by the school),
- After school activities such as arts or sports clubs,
- Additional nursery sessions,
- Lettings of premises,
- Music lessons provide at the request of the pupil's parent.

This list is not exhaustive and other items may include are charge where required by this policy.

We apply a charge to these types of activities because providing them incurs a cost for staffing, insurance and transport that cannot be absorbed by school budgets. Such provision is reviewed regularly and parents will be kept informed of any changes to charges.

9. Remissions

In some circumstances Trust schools may decide to not charge for items or activities set out in sections 6 and 8 of this policy. This will be at the discretion of the Headteacher within each school and will depend on the activity in question.

9.1 Remissions for residential visits

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

- Universal credit - If you apply on or after 1.4.18 your household income must be less than £7,400 per year (after tax and not including any benefits you get)
- Income Support
- Income Based Jobseekers Allowance
- 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 £16,190
- The guarantee element of Pension Credit
- An income related employment and support allowance

Requests for remissions must be made in writing to the Head Teacher and these will be considered on an individual basis.

10. Monitoring arrangements

The Trust Board of Directors monitors charges and remissions, and ensures these comply with this policy.

This policy will be reviewed annually by the Chief Finance Officer. At every review, the policy will be approved by the Finance and Audit Committee of the Trust Board of Directors.