



# QUANTOCK

## EDUCATION TRUST

### Charging and Remissions Policy

LINKS TO OTHER TRUST POLICIES:

DATE: November 2023

POSTHOLDER RESPONSIBLE: CEO

TRUSTEES/GOVERNORS COMMITTEE: Finance, Operations, & Audit

AUDIENCE: All members of the Trust community

STATUS: Ratified

DATE RATIFIED: November 2023

DATE OF NEXT REVIEW: (every 3 years) November 2026

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## 1. Introduction

### 1.1. Aims

Our 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

### 1.2. 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.

### 1.3. Definitions

**Charge:** a fee payable for specifically defined activities

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

If the number of school session on a residential trip is equal to or greater than 50% 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's 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.

## 2. Charging and Remissions policy

The Trust is committed to the general principle of free education and recognises the valuable contribution that a wide range of activities, including school visits and residential experiences, can make towards all aspect of students' education. It also believes that all our students should have an equal opportunity to benefit from school activities and visits (curricular and extracurricular) independent of their parent's financial means.

The Trust 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 schools will try to adhere to the following guidelines:

- Schools will publish a list of visits (and their approximate cost) at the beginning of the school year so that parents can plan ahead
- Schools have an established system for parents to pay in instalments
- Schools 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
- Where trips are over subscribed the Trust will operate a random selection from a draw.

### 3. Roles and responsibilities

#### 3.1. The board of trustees

The board of trustees has overall responsibility for approving the charging and remissions policy.

Monitoring the implementation of this policy has been delegated to the Finance, Operations & Infrastructure Committee.

#### 3.2. Headteachers/Heads of School

The Headteacher/Head of School of each school is responsible for ensuring staff are familiar with the charging and remissions policy, and that it is being applied consistently.

The board of trustees will leave to the discretion of the Headteacher/Head of School the decision as to the proportion of the cost of activities which should be charged to public or non-public funds and when to request donations.

#### 3.3. Staff

Staff are responsible for:

- Implementing the charging and remissions policy consistently
- Notifying the Headteacher/Head of School of the relevant school of any specific circumstances which they are unsure about or where they are not certain if the policy applies

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

#### 3.4. Parents

Parents are expected to notify staff or the Headteacher/Head of School of any concerns or queries regarding the charging and remissions policy.

### 4. Where charges cannot be made

Below we set out what schools are not entitled to charge for:

#### 4.1. 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 although academy trusts don't have to follow the national curriculum, they still can't 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 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

## **4.2. 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 board of trustees 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 that takes place during school hours.

## **4.3. 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

## **5. Where charges can be made**

Schools in the Quantock Education Trust are entitled to charge for the following activities:

### **5.1. Education**

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

### **5.2. Optional extras**

We are able to charge for activities known as 'optional extras'. In these cases, schools 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 that specified in 4.2)
- Board and lodging for a pupil on a residential visit
- Extended day services offered to pupils (such as breakfast clubs and after-school clubs)

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.

### **5.3. Music tuition**

Schools 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.

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

### **5.4. Residential visits**

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

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### **5.5 Deliberate damage to school property**

A charge will be made for dilate damage will not exceed the cost of the repair or breakage.

## **6. Voluntary contributions**

As an exception to the requirements set out in section 4 of this policy, schools are able to ask for voluntary contributions from parents to fund activities during school hours which would not otherwise be possible.

Some activities for which schools may ask parents for voluntary contributions include:

- School trips

- Sports activities
- Student enrichment activities

**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. The school will make this possible consequence known to parents when initially requesting financial support.

## 7. Activities we charge for

Each school may request voluntary contributions for a different range of activities. This will be indicated on the school website.

For regular activities, the charges for each activity will be determined by the Local Governance Committee and reviewed each year. Parents will be informed of the charges for the coming year in advance of the school year.

## 8. Remissions

In some circumstances schools may not charge for items or activities set out in sections 5 and 6 of this policy. This will be at the discretion of the trustees and will depend on the activity in question.

### 8.1. 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 that Working Tax Credit is not also received and the family's annual gross income does not exceed £16,190)
- Working Tax Credit run-on (this is paid for 4 weeks after an individual stops qualifying for Working Tax Credit)
- Universal Credit (if the application was made on or after 1 April 2018, the family's income must be less than £7,400 per year – after tax and not including any benefits)

## 9. Monitoring arrangements

The Headteacher/Head of School monitors charges and remissions at school level, and ensures these comply with this policy.

This policy will be reviewed by the Finance, Operations & Infrastructure Committee every three years.

At every review, the policy will be approved by the board of trustees.