



SETTLEBECK SCHOOL

Charging and Remissions Policy

Approved by: Finance and Buildings committee on behalf of Settlebeck School Academy Trust Board	
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Signed:	
Date:	September 2023
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Our school 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. Rationale

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.

2. Purpose

Settlebeck School recognises the valuable contribution that a wide range of extra-curricular activities, trips, clubs and residential experiences can make towards the education of young people and aims to promote and provide such activities both as part of a broad and balanced curriculum and as an additional optional enrichment activity. We believe that all our pupils should have an equal opportunity to benefit from Settlebeck School activities and visits (curricular and extra-curricular) independent of their parent's financial means. This policy describes how we will do our best to ensure a good range of visits and activities are offered and, at the same time, try to minimise the financial barriers which may prevent some pupils taking full advantage of the opportunities. The aim of this policy is to set out what charges will be levied for activities, and what remissions will be implemented and the circumstances under which voluntary contributions will be requested from parents/carers.

Charge: a fee payable for specifically defined school activities

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

3. Roles and Responsibilities

3.1 The Trust Board

The Trust Board has overall responsibility for determining the content of the policy and the Headteacher for implementation. Any determinations with respect to individual parents/carers will be considered by the Headteacher.

3.2 The Headteacher

The Headteacher is responsible for ensuring staff are familiar with the charging and remissions policy, and that it is being applied consistently.

3.3 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.

3.4 Parents/Carers

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

4. Implementation

4.1 Prohibition of Charge

4.1.1 Education

- Admissions applications
- Education provided during school hours (including the supply of materials, books, instruments or other equipment).
- Education provided outside of school hours **if** it is part of the national curriculum, or part of a syllabus for an approved examination that the pupil is being prepared for at the school, or part of religious education.
- Entry for a prescribed public examination, if the pupil is being prepared for it at the school.
- Instrumental or vocal tuition, for pupils learning individually or in groups, **unless** the tuition is provided at the request of a pupil's parent/carer.
- Examination re-sit(s) if the student is being prepared for the re-sit(s) at the school.

4.1.2 Transport

- Transporting registered pupils to and from the school premises, where the local education authority would have a statutory obligation to provide transport (within catchment or as agreed for pupils with SEND).
- Transporting register pupils to other premises where the Governing Body has arranged for pupils to be educated.
- Transport that enables a pupil to meet an examination requirement when he/she has been prepared for the examination in school.
- Transport in connection with an educational trip. A voluntary contribution may be requested to help towards the cost of travel and/or other expenses associated with it.

4.1.3 School Meals

- There is no charge for pupils entitled to free school meals. Pupils who are not entitled to free school meals will be charged for this service.

4.1.4 School Milk Scheme (This applies to all children aged 5-18 who are entitled to a free school meal)

We understand that under '*The Requirements for School Food Regulations 2014*', we must make lower fat or lactose reduced milk available for drinking at least once during school hours at a reasonable cost or free of charge to all pupils who are entitled.

Up to one third of a pint of milk is available to all children free of charge, regardless of their family circumstances up to the age of 5.

When a child has their 5th birthday, a small charge of 24p per day will be made towards the cost of continuing to provide milk. Children who have reached the age of 5 and have not yet reached the age of 19 can continue to receive free school milk if their family is in receipt of one of the following benefits listed in section 4.3.

4.2 Charges

4.2.1 Education

- Any materials, books, instruments or equipment where parents wish their child to own them.
- Optional extras (see 4.2.3)
- Music and vocal tuition (see 4.2.4)

- Community Facilities provided under Section 27 of the Education Act.
- To cover the cost of materials/ingredients for subjects such as design or food technology where pupils take their finished product home.

4.2.2 Transport

- Transport to and from school where the pupil lives outside of the catchment area.

4.2.3 Optional Extras

Charges can be made for some activities that are known as 'optional extras.' Where an optional extra is being provided, a charge can be made for providing materials, books, instruments or equipment. Optional extras include:

- Education outside of school time that is not
 - Part of the national curriculum
 - Part of a syllabus for a prescribed examination that the pupil is being prepared for at school.
 - Part of religious education.
- Examination entry fees or re-sits if the registered pupil has not been prepared by the school.
- Transport (other than transport to and from school for those living within catchment or for those with SEND transport).
- Boarding and Lodging on residential visits (not to exceed costs)
- Extra-curricular activities and school clubs.
- Breakages and replacements as a result of damages caused willfully or negligently by pupils.
- Any other education, transport or examination fees unless charges are specifically prohibited.

In calculating the cost of an optional extra an amount may be included in relation to:

- Any materials, books, instruments or equipment provided in connection with an optional extra.
- Cost of accommodation and meals on a residential visit.
- Non-teaching staff.
- Teaching staff engaged under contract for services purely to provide the optional extra.
- The cost or proportion of the costs for teaching staff employed to provide musical or vocational tuition where this is an optional extra.

Any charge made to individual students must not exceed the actual cost of providing the optional extra activity and must be divided equally by the number of students participating. It must not include an element of subsidy for any other student wishing to participate in the activity whose parents are unwilling or unable to pay the full charge.

4.2.4 Music Tuition

Settlebeck School follows government legislation that states that all education provided during school hours is free; however, music lessons are an exception to this rule.

Charges will be made if the teaching is **not** an essential part of either the National Curriculum or a public examination syllabus followed by the pupil.

The school may charge for teaching requested by parents and delivered by specialist tutors given to either an individual pupil or groups of any appropriate size to play a musical instrument or sing. The cost of these lessons may depend on the size of group and the duration of the lesson.

Settlebeck School is dedicated to ensuring equal opportunities for all pupils including access to specialised music tuition, therefore charges for music tuition within school hours will be reduced or remitted for pupils on free school meals and/or in receipt of the Pupil Premium Grant.

4.2.5 Use of school facilities

A charge will be made for the following:

- School accommodation (see Lettings policy)
- External photocopying and printing.

4.2.6 Debt Recovery

The Governing Body authorises the Headteacher and the school to take all reasonable measures to collect debts as part of its management of public funds and in doing so, it will observe the relevant financial regulations and any other legal requirements. The school will follow set procedures to secure the collection of all debts. A decision to write off a debt will only be taken after all reasonable measures have been taken to recover it. Unless a decision to write off a debt is demonstrably a reasonable course of action, authorisation is in place to initiate legal or other action to recover debts. A formal record of any debts written of will be maintained and held for 7 years.

4.3 Remissions

Children whose parents can prove they are in the receipt of the following benefits will be exempt from paying the cost of board and lodging during a residential trip.

- 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)
- Income Support
- Income based Job Seekers Allowance
- Income related Employment and Support Allowance
- Support under part VI of the Immigration and Asylum Act 1999.
- Child Tax Credit, provided Working Tax Credit is not also received and the family's income (as assessed by HMRC) does not exceed £16,190
- Guaranteed element of Pension Credit
- Working Tax Credit run on (this is paid for 4 weeks after the individual stops qualifying for Working Tax Credit)
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Any family that needs assistance with charges are invited to apply to the Headteacher. Any discussions or decisions will be confidential.

5 Voluntary Contributions

Settlebeck School is legally allowed to ask for voluntary contributions for the benefit of the school or school activities that will enrich our pupil's education. The Headteacher is responsible for ensuring that parents are made aware that there is no obligation to make any contribution, but if the activity cannot be funded without voluntary contributions, then it will not take place.

The protocol for voluntary contributions is:

- Parents will be invited to make voluntary contributions for school activities in and out of school hours for which compulsory charges cannot be levied but can only be provided if there is sufficient voluntary funding, whilst ensuring no child is excluded from such activity by reason of inability or unwillingness to make a voluntary contribution.
- The term of any request made to parents will specify that the request or a voluntary contribution in no way represents a charge. In addition, the following will be made clear to parents:
 - that the contribution is genuinely voluntary and a parent/carer is under no obligation to pay.

- that registered pupils of the school will not be treated differently according to whether or not their parents have made contributions in response to the request.
- Voluntary contributions may be used to fund:
 - Travel
 - Cost of day trips
 - Materials and equipment
 - Entrance fees
 - Insurance costs
 - Board and lodging
 - Staffing costs (including administration costs)

Review

This policy is formally reviewed by the Trust Board annually.

A report is submitted to the Finance and Buildings Committee on termly basis.

Appendix A

Frequently asked questions



Department
for Education

Q. What is a charging policy?

A. Under the charging provisions set out in legislation, governing bodies and local authorities of state funded schools may choose to charge for certain defined activities, but only if they have first drawn up charging and remissions policies. These policies should be made available to parents on request.

Q. How does this relate to academies?

A. Academies (including free schools, studio schools and university technical colleges) are required through their funding agreements to comply with the law on charging for school activities.

Q. A visit involving staying overnight has been arranged for children at my school. Can the school charge for this?

A. Where a school activity requires pupils to spend nights away from home, the school is allowed to make a charge for board and lodging. This is with the exception of pupils whose parents are in receipt of certain benefits. The list of benefits to which this applies can be found at <https://www.gov.uk/apply-free-school-meals>. Since April 2003 the eligibility criteria that entitle families to an exemption from paying for the cost of board and lodging on residential visits have been aligned with free school meals eligibility criteria. The Head teacher must inform all parents of the right to claim free board and lodging if they are receiving these benefits.

Q. With regard to the remission of board and lodging payments, explain who pays for the expense? Would it come out of the school budget or is there a grant available to claim?

A. Although the criteria for being eligible for the remission of charges for board and lodgings is the same as free school meals, that is where the similarity ends. The costs involved in the remission of board and lodgings are to be borne by the school from their contingency funds. There is no return to be completed to re-claim the money back.

Q. Our school has a large number of pupils eligible for free school meals. This means that they would also receive remission for board and lodgings expenses for residential visits. How can the school fund/organise residential visits?

A. Government funding for schools to each local authority recognises the different needs of each area. In terms of the allocation to schools, each local authority sets a funding formula which is agreed with the local schools' forum. All local authorities are required to include an element in their formula to reflect the needs of deprived pupils. The amount that individual schools receive from the local authority reflects their relative need compared with other local schools. In addition, schools receive pupil premium funding for disadvantaged pupils, based largely on those who are eligible for free school meals. This funding is provided by the government to raise the attainment of eligible pupils and narrow the attainment gap between eligible pupils and their peers. It is for head teachers and school governing bodies to decide how to use their formula funding and pupil premium allocation.

Schools cannot exclude children from taking part in an activity that is part of the national curriculum purely on the grounds that the parent or carer cannot make, or refuses to make, a contribution. This can clearly place schools in some difficulty on occasions where a number of parents/carers might be in such a position. The school then has to decide whether they can cover the costs of such activity from within the budget or by fundraising, or whether the activity has to be cancelled.

If there is a residential activity taking place largely during school time, or which meets the requirements of the syllabus for a public examination or is to do with the national curriculum or religious education, no charge may be made either for the education or for the cost of travel.

Q. Can governing bodies charge for educating children in maintained schools and academies?

A. The local authority or governing body cannot charge for education that takes place in school hours. Nor can they charge for activities that take place outside school hours if these are part of the national curriculum, necessary as part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education. They can charge for permitted 'optional extras', provided they have drawn up a statement of general policy on charging and given details of 'optional extras' they intend to charge for. The governing body's policy does not have to be the same as the local authority's policy, as long as it meets the requirements of the law.

Q. Can a school charge for an activity that takes place out of school hours?

A. This kind of activity is often referred to as an 'optional extra'. Where an optional extra is being provided, a charge can be made for providing materials, books, instruments, or equipment. See advice on optional extras on page 4 of DfE document '*Charging for school activities: Departmental advice for governing bodies, school leaders, school staff and local authorities*', May 2018.

The actual charge for the optional extra cannot exceed the actual cost of the provision. Schools cannot and must not make a profit from charging for optional extras. Participation in any optional extra activity will be on the basis of parental choice and a willingness to meet the charges. Parental agreement is therefore a necessary prerequisite for the provision of an optional extra where charges will be made.

Q. Can a school ask parents for voluntary contributions?

A. Schools may invite parents and others to make voluntary contributions to make school funds go further. All requests to parents for voluntary contributions must make it clear that the contributions would be voluntary. It should be remembered that education provided during school hours must be free. This includes materials, equipment, and transport provided in school hours by the local authority or by the school to carry pupils between the school and an activity. Governing bodies should also clearly explain that children of parents who do not contribute will not be treated any differently, and that the activity might be cancelled if insufficient contributions are received.

Q. The school has sent letters out to parents asking for contributions towards a school visit, do parents have to pay?

A. Head teachers or governing bodies may ask parents for voluntary contributions towards the cost of:

- any activity which takes place during school hours;
- school equipment; and
- school funds generally.

Children of parents who are unable, or unwilling, to contribute may not be discriminated against. However, if insufficient voluntary contributions are received to cover the cost of the visit, or activity, and there is no alternative method to make up the shortfall, then the school should cancel the activity/visit. It would be advisable to make parents aware of a possible cancellation to the activity/visit if insufficient voluntary contributions are received from the outset.

Q. What happens if the school is not able to raise enough voluntary contributions to cover costs?

A. Where there are not enough voluntary contributions, and there is no way to make up the shortfall, for example school funds and/or fundraising activities, then it must be cancelled. The possibility of the activity/visit being cancelled due to a shortfall in contributions should be made clear in the information sent to parents.

Q. What if a parent is unable, or unwilling to make a voluntary contribution? How does this affect their child(ren)?

A. The school cannot exclude a child from taking part in an activity that is part of the national curriculum purely on the grounds that the parent or carer cannot make, or refuses to make, a contribution. This can clearly place schools in some difficulty on occasions where a number of parents/carers might be in such a position. The school then has to decide whether they can cover the costs of such activity from within the budget or by fundraising, or whether the activity has to be cancelled.

Q. What support can a school offer a parent/carers who has difficulty making a financial contribution?

A. Where a residential trip includes education for which charging is prohibited and the pupil's parent is in receipt of certain benefits, they will be exempt from paying the cost of board and lodging. The list of benefits to which this applies can be found at <https://www.gov.uk/apply-free-school-meals>. Schools must ensure that parents are aware of the support available to them when being asked for contributions toward the costs of school visits. Some schools also have funds available to enable families in financial difficulty to send their children on visits/activities. Parents should be encouraged to speak to the head teacher in order to establish if such funding arrangements exist.

No charge may be made if there is a residential activity taking place largely during school time, or which meets the requirements of the syllabus for a public examination. In addition, if the activity is to do with the national curriculum or religious education, no charge may be made either for the education or for the cost of travel for any pupil, not just those whose parents are in receipt of benefits.

Q. What about charges for transport during school hours?

A. Any transport provided by the school in school hours must be provided free of charge (though a voluntary contribution could be requested).

Q. Can the school charge for something like cooking ingredients or materials needed for a technology lesson?

A. The school can make a charge to cover the costs of materials/ingredients for subjects such as design or food technology where parents have indicated in advance that they would like their child to bring home the finished product.

Q. Can the school charge entry fees for examinations?

A. An examination entry fee may be charged to parents if:

- the examination is on the set list, but the pupil was not prepared for it at the school;
- the examination is not on the set list but the school arranges for the pupil to take it;
- a pupil fails without good reason to complete the requirements of any public examination where the governing body or local authority originally paid or agreed to pay the entry fee.

Q. Can a school make a charge to pay for the administration required as part of the admission process?

A. Paragraph 1.9 (n) of the 'Schools Admission Code 2012' rules out requests from admission authorities for financial contributions as any part of the admissions process. Legislation prevents state funded schools from charging fees for admission or for providing education during school hours.

Q. Can a school ask for a direct debit to the school fund?

A. No. A school may ask for voluntary contributions, as long as it is clear that they are voluntary, but we are clear that state education should be free and we have no intention of changing this policy. No contributions may be sought as part of the admissions process.

Q. Can a school ask parents to contribute to (or pay in full) the cost of a tablet or computer?

A. Sections 451 and 454 of the Education Act 1996 prohibits schools from charging for education and the supply of materials, books, instruments or other equipment (this would include tablets), during school hours. However, there is no prohibition on asking parents to make voluntary contributions. Additionally, there is a specific exception in the legislation which enables schools to charge for materials where the pupil's parent wishes them to own the materials. All contribution requests to parents must make clear that the contributions are voluntary and that, if a parent cannot make or refuses to make a contribution, their children will not be treated any differently and will not be excluded from taking part in any activity or related equipment.

Q. What are community facilities?

A. Schools are allowed to provide facilities that can be used by the local community, for example out-of hours/holiday childcare. These facilities further any charitable purpose for the benefit of pupils at the school or their families, or people who live or work in the locality in which the school is situated. Academies should seek guidance from the Charity Commission if they are in doubt. Advice from the Charity Commission can be found at

<https://www.gov.uk/government/organisations/charity-commission>.

Schools can charge for the use of these facilities, and a profit can also be generated, providing it is spent on the purposes of the school and or on community facilities.

Maintained schools should check the local authority's published financial "scheme" for maintained schools in their area for any rules about the carry of profit from one financial year to the next. Academies should determine fees and charges in accordance with chapter 6 of HM Treasury's Managing Public Money.