

Technical learning with local professional partners



# **Charging and Remissions Policy**

**2017**

# QEStudio

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Appendix I – Department for Education FAQs



## **1. Introduction**

Lunesdale Learning Trust recognises the valuable contribution that a wide range of extra-curricular activities, including visits, clubs and residential experiences can make towards the education of our pupils and aims to promote and provide such activities both as part of a broad and balanced curriculum and as additional optional enrichment activities.

Lunesdale Learning Trust strive to ensure that all pupils have an equal opportunity to benefit from such activities, both on and off site and within and outside of the curriculum, regardless of their family's financial means. To ensure transparency in setting charges and also to ensure all young people are able to access all of the provision we offer, this Policy sets out our approach to charging and remissions. It has been informed by adherence to the law and by following national government guidance.

The purpose of this policy is to ensure that, during the school day, all young people have full and free access to a broad and balanced curriculum. The school day is defined as 08.40 – 15.20 excluding the lunchtime period. A school session is equivalent to half a day i.e. either one morning session before lunch or one afternoon session afterwards.

Where this policy refers to parents we mean any person with parental responsibility for a child or young person.

This policy does not apply to charges made and determined by other organisations offering activities and services on the school premises.

## **2. Admissions**

No charge will be made for any aspect of the admissions process to either school in the Trust.

## **3. Activities wholly during the school day**

No charge will be made for education provided during normal school hours. This includes all activities related to the National Curriculum as well as the materials, equipment and transport required to provide it. The provision of Music Tuition is covered under point 8. below.

We recognise that the definition of 'part of the National Curriculum' is not limited to learning outside the classroom experiences required as part of a specific subject e.g. geography or science fieldwork, but also includes activities designed to fulfil requirements under the National Curriculum 'inclusion statement' and others as applicable.

No charge will be made for entry to a prescribed public examination if the pupil has been prepared for it at this school.

A charge will be made to cover the cost of ingredients or materials where parents have confirmed in advance that they wish their child to own the finished product.

The schools offer pupils the opportunity to have their own copies of textbooks, specialist art materials etc. as desired. A charge will be made for any educational materials that parents have confirmed in advance that they wish their child to own. No young person will be disadvantaged if they do not or cannot take up the opportunity.



We will ask parents for voluntary contributions to help school fund the range of these opportunities we offer, but no young person will be excluded from an activity on the basis of a parent's inability or unwillingness to pay this contribution. The Governing Body reserves the right, however, to cancel an activity in its entirety if insufficient voluntary contributions are received.

From time to time we may invite a non-school based organisation such as a dance company to deliver an activity during the school day. In most cases this will be provided free of charge. In some cases, however, parents will be asked for a voluntary contribution towards the cost of the activity.

#### **4. Activities wholly outside the school day**

A charge will be made for education provided outside of normal school hours unless it is part of the National Curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at this school.

We will ask parents for voluntary contributions to help school fund the range of these opportunities we offer, but no young person will be excluded from an activity on the basis of a parent's inability or unwillingness to pay this contribution. The Governing Body reserves the right, however, to cancel an activity in its entirety if insufficient voluntary contributions are received.

Lunchtime and after school clubs and activities are wholly outside of school hours and do not fall under the definition of education above. Please see Point 6. Optional Extras.

#### **5. Non-residential activities that take place partly during and partly outside the school day**

Where the majority of time spent on a non-residential activity is *within* normal school hours, the charging regime will be as if it happens *fully within* school hours.

Where the majority of the time spent on a non-residential activity is *outside* of normal school hours, the charging regime will be as if it happens *fully outside* school hours i.e. the activity becomes an 'Optional Extra'.

#### **6. Residential activities**

A charge will be made to the parents of pupils who wish to participate in residential activities for the cost of board and lodging with the exception of those in receipt of Universal Credit in prescribed circumstances (if the government plans to prescribe the circumstances only after Universal Credit is fully rolled out), Income Support, Income based Jobseeker's Allowance, Support under Part VI of the Immigration and Asylum Act 1999, Child Tax Credit (with provisions) and/or the Guarantee element of State Pension Credit or an income related employment and support allowance (ESA).

Other charges will be made to cover associated costs only where the number of normal school sessions (defined in the Introduction) missed by the pupils taking part totals half or more of the number of half-days taken up by the activity. In such cases, parents will be told how the charges were calculated.

In order to cover any other costs associated with a residential visit e.g. activity tuition, for which charges cannot be made, parents will be asked to make a voluntary contribution. No child will be

denied the opportunity of attending a residential if the parents do not wish to or cannot contribute voluntarily, however it is possible that unless sufficient voluntary contributions are received to cover

the cost, the experience will not go ahead. The Governing Body reserves the right to cancel an activity in its entirety if insufficient voluntary contributions are received.

## 7. Optional Extras

The Governing Body reserves the right to charge parents for activities deemed to be optional extras. Such activities will include, for example, a visit to the Theatre.

A charge will be made for examination entry fee(s) if the pupil has not been prepared for the examination(s) at this school.

Lunchtime and after school activity clubs do not operate during normal school hours and in order to recover the costs of offering such opportunities a charge may be made to the parents of pupils who wish to participate in them. Families on a low income who are unable to pay such charges should write to the headteacher in complete confidence.

In 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;
- Non-teaching staff;
- Teaching staff engaged under contracts for services purely to provide an optional extra, this includes supply teachers engaged specifically to provide the optional extra; and
- A proportion of the costs, for teaching staff employed to provide an optional extra, for example, tuition in playing a musical instrument, Arts Award, Theatre School or examination resit.

## 8. Music Tuition

A charge will be made for vocal and musical instrument tuition for either an individual pupil or groups of any appropriate size, as tuition is not a requirement of the National Curriculum, or other KS4/KS5 qualification. A remissions policy exists for instrumental/vocal tuition however and to request information about this write to the Headteacher.

National charging guidance is followed.

## 9. Damage to property and breakages

The school will attempt to recover some or all of the costs incurred repairing wilful damage or breakage of school property and wilful damage or breakage of property belonging to a third party where the school has been charged. The actual amount will be determined by the Head teacher.

## 10. Calculating charges

When charges are made for any activity, whether during or outside of the school day, they will be based on the actual costs incurred, divided by the total number of pupils participating. There will be



no levy on those who can pay to support those who can't. Support for cases of hardship will come through applicable funding such as pupil premium monies, specified voluntary contributions and fundraising.

Parents who would qualify for support are those who in receipt of benefits as described in section 6.

The principles of best value will be applied when planning activities that incur costs to school and/or charges to parents.

## **11. Debt recovery**

The Governing Body authorise school to take all reasonable measures to collect debts as part of its management of public funds. In doing so it will observe the relevant financial regulations and any other legal requirements.

Staff will follow set school procedures to secure the collection of all debts. A debt will be written off only after all reasonable measures (commensurate with the size and nature of the debt) have been taken to recover it. Only debts below that allowed for in the annual funding letter issued by the Secretary of State may be written off. The recovery of any sums above this amount will be referred first to the Governors and then to the Secretary of State for approval. If any debtor has a number of debts that together exceed the write-off limit then these will be treated as a total amount.

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 off will be maintained and this will be retained for 7 years.

## **12. Arrangements for monitoring and evaluation**

The Finance Committee of the Governing Body will review this policy annually.

## **13. Associated policies and procedures**

- Educational Visits Procedures
- Single Equality Scheme

## Charging for school activities: Questions and answers

**Q.** What is a charging policy?

**A.** Under the charging provisions set out in legislation, governing bodies and local authorities of maintained 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.** A visit involving staying overnight has been arranged for pupils 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 receiving: Income Support; Income-based Jobseeker's Allowance; Support under part VI of the Immigration and Asylum Act 1999; or Child Tax Credit (providing that they do not also receive Working Tax Credit and have an annual income, assessed by the Inland Revenue that does not exceed £15,575 FY 08/09) and an income related employment and support allowance. Since April 2003 the eligibility criteria that entitles 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 & lodging payments, can you please 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 school visits. How can the school fund/organise residential visits?

**A.** The government provides funding for schools to each local authority according to a formula which recognises the different needs of each area. The same basic funding is provided for all comparable pupils across the country. This is then topped up according to local needs. One of these top-ups reflects the numbers of pupils in a certain area living in deprived circumstances, as these pupils need extra help if they are to have an equal opportunity in life. The amount that individual schools receive from the local authority reflects their relative need compared with other local schools, through the locally agreed funding formula. All local authorities' funding formulae are required to include an element to reflect the needs of deprived pupils. It is for Head teachers and school governing bodies to decide how to spend their available resources. 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.

- Q. Can governing bodies charge for educating children in maintained schools/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 guidance on optional extras.  
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 pre-requisite 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 quite 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. Headteachers 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 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/carer who has difficulty making a financial contribution?**
- A. Schools must ensure that parents in receipt of 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 the current amount. 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.
- Q. What about charges for transport during school hours?**
- A. Any transport provided by the school in school hours will be provided free of charge (though a voluntary contribution could be requested). Please read the guidance on school travel and transport.
- 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; and
  - a pupil fails without good reason to complete the requirements of any public examination where the governing body or LA 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. Para 1.82 of the current School Admissions Code and para 1.93 of the revised School Admissions Code (which comes into force in February 2009) rules out practices that can lead to covert selection, such as asking parents for a financial contribution as a condition of entry. We are clear that schools cannot ask for a voluntary contribution as part of the admissions process and where this is found, we will not tolerate it. Legislation prevents maintained 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. We will not tolerate this when it is brought to our notice. No contributions may be sought as part of the admissions process.