

CHARGING AND REMISSIONS POLICY



WHERE LEARNING IS UNSTOPPABLE AND ASPIRATIONS HAVE NO LIMITS

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Signed:

A handwritten signature in blue ink that reads "Ruth Slater".

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1. Background

The purpose of this policy is to set out the Trust's approach to charging, voluntary contributions and remissions, ensuring that these arrangements are lawful, fair, transparent and consistently applied across all academies within Orwell Multi Academy Trust ("the Trust").

This policy supports the Trust's systems of financial control and ensures compliance with the Trust's Funding Agreement with the Department for Education, the Academies Trust Handbook and relevant legislation relating to charging for school activities.

The policy explains the circumstances in which charges may be made to parents and carers, when voluntary contributions may be requested, and how remissions may be applied to ensure that no pupil is excluded from educational opportunities due to financial hardship.

This policy applies to all academies within the Trust and is mandatory for all staff involved in planning, organising or administering activities that may involve charges or contributions.

This policy should be read in conjunction with the Trust Finance Policy and other related financial policies and procedures and forms part of the Trust's overall financial governance framework.

2. General Principles

The Trust is committed to the principle of free education. No pupil will be excluded from essential educational provision or core curriculum activities because of their parents' or carers' inability to pay.

The Trust recognises the significant educational value that enrichment activities, including educational visits, residential experiences, performances and clubs, can bring to pupils' academic, social and personal development. The Trust therefore seeks, wherever possible, to promote and provide such opportunities as part of a broad and balanced curriculum across its academies.

In applying this policy, the Trust aims to ensure that charging arrangements are fair, transparent and consistent, and that families are treated with sensitivity and respect when financial contributions are requested.

This policy is informed by the Department for Education's statutory guidance on charging for school activities. Sections 449–462 of the Education Act 1996 set out the legal framework for charging in maintained schools, and academies are required through their funding agreements to comply with the same principles.

3. School Charging

The Trust will not normally levy charges for the following:

- Education provided during academy hours, including the provision of essential materials, books, instruments or equipment required for the delivery of the curriculum
- Education provided outside academy hours where it forms part of the academy's syllabus or the academy's basic curriculum for religious education
- Tuition for pupils learning to play a musical instrument or singing where the tuition is required as part of the National Curriculum
- Educational visits or activities that take place wholly or mainly during academy hours
- Educational visits or activities that take place outside academy hours but form part of the curriculum
- Admission applications for a place at any academy within the Trust

Charges may be levied in the following circumstances:

- For materials, books, instruments or equipment where parents or carers have indicated that they wish their child to own the item
- For optional extra activities that are provided wholly or mainly outside academy hours and are not part of the curriculum, where participation is based on parental choice, agreement and willingness to pay. This may include board and lodging on residential visits or extended day services such as breakfast clubs
- For tuition in the playing of a musical instrument or singing where the tuition is not required as part of the National Curriculum
- For the use of community facilities, including lettings
- For certain Early Years provision, such as nursery fees for pupils who are not eligible for funded hours

In all cases where charges are made, the amount charged will not exceed the actual cost of providing the activity or service.

4. Voluntary Contributions and Optional Extras

When organising activities, visits or experiences that enrich the curriculum and enhance pupils' educational experience, academies may invite parents or carers to make a voluntary contribution towards the cost of the activity. All such contributions are voluntary.

Parents and carers will be informed clearly and in advance that there is no obligation to make a voluntary contribution and that no pupil will be excluded from an activity or treated differently because a contribution has not been made.

Where an activity is dependent on a minimum level of voluntary contributions in order to proceed, the academy may decide to cancel the activity if insufficient contributions are received. If the activity proceeds, it may include pupils for whom no contribution has been made, and those pupils will not be identified or treated differently in any way.

The Trust recognises that some activities are provided as 'optional extras'. These are activities that take place wholly or mainly outside academy hours and are not part of the statutory curriculum. Examples may include, but are not limited to:

- visits to museums or cultural venues
- sporting activities that require transport
- outdoor and adventurous activities
- residential visits
- theatre visits
- overseas educational visits
- musical events or performances

This list is illustrative and not exhaustive.

Where a charge is made for an optional extra, the charge will not exceed the actual cost of providing the activity. The cost may include appropriate elements such as:

- travel and transport
- board and lodging
- materials, books, instruments or other equipment
- staff costs directly related to the activity
- entrance or participation fees
- insurance costs

No element of the charge will be intended to generate a profit.

5. Residential Visits & Activities Outside School Hours

The Trust and its academies may seek parental contributions or apply charges, in accordance with this policy, for activities that are deemed to be optional extras and that take place wholly or mainly outside academy hours.

Such activities may include, but are not limited to, residential visits, theatre trips, school discos, and specialist sports coaching.

Where activities involve residential visits, charges may be made for board and lodging. Any such charges will not exceed the actual cost incurred by the Trust in providing the activity.

Participation in these activities will always be based on parental choice and agreement. Where contributions are voluntary, parents and carers will be informed clearly that there is no obligation to contribute and that no pupil will be excluded or treated differently due to an inability or unwillingness to pay.

All residential visits and activities outside school hours must be planned carefully to ensure they are affordable, inclusive and aligned with the Trust's educational objectives.

6. Materials & Equipment

Where activities take place wholly or mainly outside academy hours and are voluntary and optional, the cost of purchasing or hiring instruments, materials, equipment or clothing associated with those activities may be met by parents or carers.

Parents and carers remain responsible for providing standard school uniform, including physical education (PE) kit, as required by the academy.

An academy may charge for materials used in lessons or activities where parents or carers have indicated, in advance, that they wish their child to own the finished product. This may include, for example, items produced in Design and Technology lessons.

In all cases, charges for materials or equipment will not exceed the actual cost incurred by the academy.

7. Music Tuition

All pupils study music as part of the normal school curriculum, and there is no charge for this provision.

Where pupils receive whole-class instrumental tuition as part of the curriculum, no charge will be made. Where a pupil chooses to continue instrumental tuition beyond the initial entitlement, charges may be made on a termly basis. Any such charges will be based on the shared cost of the tuition, and the loan of an instrument will be provided free of charge where applicable.

The cost of individual or small-group instrumental or vocal tuition, whether delivered during or outside school hours, will normally be the responsibility of parents or carers. This does not apply where the tuition is provided as part of the syllabus for a prescribed public examination or where it is required as part of the National Curriculum.

No charge will be made for individual music tuition provided during school hours to pupils who are looked after by a local authority, as defined under section 22(1) of the Children Act 1989.

8. Breakages and damage to school property or equipment

The Trust expects pupils to take reasonable care of school property and equipment. Where loss of or damage to property occurs as a result of deliberate, wilful or negligent behaviour, the Trust reserves the right to seek appropriate reparation from parents or carers.

Deliberate, wilful or negligent damage to academy resources places an unfair strain on the Trust's budget and may compromise the availability of resources for other pupils. For this reason, where such damage occurs, the Trust may require the cost of repair or replacement to be met.

In determining appropriate reparation, the following principles will apply:

- In cases of loss of or irreparable damage to books, IT equipment, PE equipment, Design and Technology tools or similar resources, the academy may seek the market rate for repair or replacement.
- In cases of damage to buildings, fixtures, furniture or fittings, the academy may seek the cost of repair or, where repair is not possible, the cost of an appropriate replacement.
- Where damage has occurred as a result of criminal behaviour by others, the Trust will cooperate fully with the police and other relevant authorities with a view to seeking restitution.
- Where the costs of repair or replacement have not been met following wilful loss, damage or criminal behaviour, the Trust may consider further action, including civil recovery or referral to the Small Claims Court, where this is deemed appropriate and proportionate.

Each case will be considered on its individual circumstances, and the Trust will act reasonably and fairly in determining any action taken.

9. Remissions

The Trust is committed to ensuring that pupils are not excluded from educational opportunities due to financial hardship.

Where parents or carers of a pupil are in receipt of one or more of the following benefits, financial support may be made available to cover all or part of the cost of chargeable activities:

- Income Support
- Income-based Jobseeker's Allowance
- Support under Part IV of the Immigration and Asylum Act 1999
- Child Tax Credit (provided that Working Tax Credit is not also received and the household income does not exceed the threshold set by HM Revenue and Customs)
- Universal Credit, where the application was made on or after 1 April 2018 and the household's net earned income does not exceed £7,400 per year

Support may be provided from school budgets or, where appropriate, in partnership with local charitable organisations. Parents or carers may be asked to provide supporting information to enable the school to consider remission or to assist with applications for external funding.

The Trust may, from time to time, decide to remit all or part of the cost of activities involving particular pupils. Authority for such decisions rests with the Trust Board and may be delegated to the relevant Local Governing Committee.

In addition to the above, there may be other circumstances of family hardship which make it difficult for pupils to take part in particular activities for which a charge is made. When arranging a chargeable activity, academies will therefore invite parents or carers to apply in confidence for the remission of charges, in part or in full. Decisions

regarding remission in such cases will be made by the Headteacher on behalf of the Trust, in accordance with delegated authority.

On occasion, year groups or school communities may raise funds through fundraising activities to support the overall cost of a trip or activity. Funds raised in this way will be used to reduce the overall cost of the activity and support inclusion.

Any additional remission arrangements for a particular activity or pupil may be considered at the discretion of the Local Governing Committee. Any subsidy agreed will be met from the funds available to the academy or committee.

Nothing in this policy prevents the Trust from inviting parents or carers to make voluntary contributions for the benefit of the school or in support of any school activity, whether during or outside school hours. All such contributions will remain voluntary, and pupils will not be treated differently based on whether or not a contribution is made. Where activities depend on voluntary contributions, sufficient contributions will need to be received for the activity to be viable.

10. Debt Recovery

The Trust has a responsibility to manage public funds appropriately and will seek to recover debts owed in order to protect resources available for teaching and learning.

Academies within the Trust are authorised to pursue outstanding debts in a fair, proportionate and sensitive manner, having regard to individual circumstances and the impact on families. Where appropriate, this may include the use of external specialist debt recovery agencies, provided that the cost of recovery is proportionate and does not result in a net financial loss to the academy.

All debt recovery activity must be undertaken in accordance with the Trust Finance Policy and associated procedures, which set out the stages of debt recovery, approval requirements and write-off arrangements.

Further information relating to debt recovery processes can be found in the Trust Finance Policy available on the Trust SharePoint.

11. Review

This policy will be reviewed periodically to ensure it remains compliant with statutory requirements, Department for Education guidance and the Trust's Funding Agreement.

The Trust reserves the right to review and amend this policy at any time where changes in legislation, guidance or Trust practice make this necessary.