



Elm Tree Multi Academy Trust

Charging and Remissions Policy

September 2023

Approval and Review

Effective from: September 2023

Approved by: Resources

Review leader: A Woodward, Chief Financial Officer

Review date: September 2027

1. Aims

Elm Tree Multi Academy 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 and will not be made
- Offer a range of activities and visits whilst minimising the financial barriers that may prevent some pupils from taking full advantage of these opportunities

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 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 is 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.

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 Board of Trustees

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

4.2 Local Governing Bodies

Monitoring the implementation of this policy has been delegated to the Local Governing Body of each school.

4.3 Headteachers

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

4.4 Staff

All trust staff are responsible for:

- Implementing the charging and remissions policy consistently
- Notifying their headteacher of any specific circumstances which they are unsure about or where they are not certain if the policy applies

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

4.5 Parents

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

5. Where charges cannot be made

The following list details items that **cannot** be charged for:

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 governing board 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, covering for teachers who are absent from school, accompanying pupils on a residential visit

6. Where charges can be made

The following list details items that each school **can and may** charge for:

6.1 Education

- Any materials, books, instruments or equipment, where the child's parent wishes him or her to own them
- Optional extras (see section 6.2)
- Music and vocal tuition, in limited circumstances (see section 6.3)
- Certain early years provision
- Community facilities
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school **and** the pupil fails, without good reason, to meet any examination requirement for a syllabus
- Remark of examination paper if requested by the student. This will be refunded if, as a result of the remark, the grade is improved upon.

6.2 Optional extras

Each school is 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 transport that is required to take the pupil to school or to other premises where the local authority or 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

Each school 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, administration time and wear and tear/replacement of instruments.

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

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

6.6 School Meals

There is no charge for students who are eligible for free school meals. Students who are not entitled to free school meals will be charged as per the displayed prices.

6.5 School Property

The trust reserves the right to make a charge to parents if their child's inappropriate behaviour causes damage to school property of staff property/personal belongings up to a maximum of £500.

7. Voluntary contributions

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

Some activities for which the school may ask parents for voluntary contributions including school trips and visits. 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.

8. Remissions

In some circumstances, the school may not charge for items or activities set out in sections 6 and 8 of this policy. This will be at the discretion of the Head Teacher and will depend on the activity in question.

8.1 Remissions for residential visits

In some circumstances, the Head Teacher will remit (wholly or partly) any charge which would otherwise be payable in accordance with this Policy. Parents who would qualify for support are those families who are in receipt of eligible benefits, or who face sudden financial hardship. Eligible benefits include Income Support, Income Based Job Seekers Allowance, Support under part IV of the Immigration and Asylum act 1999.

In order to be considered for remission of charges, satisfactory information must be provided by the parent/carer in writing to the Head Teacher. A contribution of at least 50% will be required from parents (this is only reduced in very exceptional circumstances). Remission of charges is unlikely to be considered if the student concerned has had assistance previously, and continued assistance will prevent others receiving support.

If there are other specific sources of funding for families in particular situations (e.g. Young Carers, Looked After Children), we may first recommend these to parents as a way of meeting costs.

Remission of charges for overseas visits will only be considered where the activity has sound educational value, directly related to the curriculum.