



DorneySchool

CHARGING AND REMISSIONS POLICY

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APPROVAL



Author(s)	Reviewer	Approval
Debbie Rowdene, Finance Director Charlie Whieldon, Trustee of Finance Committee	Andy Gillespie, Head Teacher	Trustees – Finance Committee

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1. Introduction

This policy is intended to:

provide clarity as to when the Academy can make a charge to Parents, or ask them to make a voluntary contribution, towards the cost of activities, visits, residential trips and associated costs, and other items such as books, materials, instruments and equipment, examination entry fees and the repair / replacement of property;

provide clarity as to when Parents may be eligible for statutory remission of the cost of board and lodging on educational residential visits.

This policy is intended to comply with sections 450 to 462 of the Education Act 1996 (**EA 1996**) which apply to Academies by virtue of their funding agreements and current advice published by the Department for Education (**DfE**) on charging and remission. In the event of inconsistency between the legislation / DfE advice and this policy, the legislation / DfE advice will apply.

2. Definitions

Where the following words or phrases are used in this policy:

references to the **Proprietor** are references to Beeches Learning and Development Trust, the Academy Trust.

references to **Parent** or **Parents** means the natural or adoptive Parents of the pupil (irrespective of whether they are or have ever been married, with whom the pupil lives, or whether they have contact with the pupil) as well as any person who is not the natural or adoptive Parent of the pupil, but who has care of, or Parental responsibility for, the pupil (e.g. legal guardian).

3. Implementation and application

The Academy will make Parents aware of this policy by publishing it on the Academy's website and providing a hard copy on request to the Finance Director. In addition, information about particular activities, trips and visits will be notified to Parents by letter with full details of the costs involved (this is set out in further detail below).



The Academy will ensure that all staff are familiar with this policy and ensure that it is implemented in relation to any activities, trips or visits they organise. Staff will ensure that that no charge is made to Parents unless it is permitted under policy. All requests for payments must be referred to the Finance Director for action and / or approval before they are sent out.

4. Prohibited charges

No charge can be made in connection with admission to the Academy.

No charge can be made for education provided to pupils, or for books, materials, instruments or transport used in connection with the education provided to pupils:

- wholly or mainly in school hours (excluding the lunch break); or
- wholly or mainly outside school hours and provided:

as part of the National Curriculum;

as part of the syllabus for a prescribed examination for which the pupil is being prepared by the Academy; or

as part of statutory religious education;

No charge can be made for the cost of making alternative provision for pupils remaining in school when an activity, trip or residential visit takes place out of school.

No charge can be made for entry to a prescribed public examination where the pupil has been prepared for the examination by the Academy, including re-sits. The following exceptions apply:

- where the pupil, without good reason, fails to complete a requirement of a public examination, and the Academy has paid or agreed to pay the entry fee, the Academy can recover the entry fee from the Parents;
- the Academy is not obliged to enter a pupil for a public examination it has prepared the pupil for where it considers there are educational reasons for not entering the pupil. Where this is the case and the Parents nevertheless ask for the pupil to be entered, the Academy can make a charge for the entry fee.

5. Permitted charges

The Academy is permitted to make the following charges:

The cost of activities, trips and residential visits provided wholly or mainly outside school hours (i.e. 'optional extras') including (but not limited to):

- activities;
- non-teaching staff who provide the activities (excluding the Academy's own staff, but including teaching staff engaged under a contract for services purely to provide that specific activity);



- transport (including the proportionate cost of transporting pupils in the Academy's own vehicle);
- buildings and other venues;
- materials, books, instruments or equipment;
- entrance fees;
- board and lodging (on residential visits); and
- insurance.

the cost of providing instrumental and vocal music tuition to an individual pupil or a group of pupils as an 'optional extra' at the request of Parents in or outside of school hours (this does not apply to music tuition provided as an essential part of the National Curriculum, or as part of the syllabus for a prescribed examination]). This includes the cost, or an appropriate proportion of the cost, of teaching staff employed to provide the tuition as an 'optional extra';

the cost of a finished product (e.g. in art, craft, design or home economics) which Parents have confirmed they want to own (including food items made and consumed by pupils), having been notified in advance of the relevant charge;

the cost of extended services for pupils (e.g. breakfast and after-school clubs);

the cost of entry to an examination (prescribed or otherwise) for which the pupil has not been prepared by the Academy;

the cost of preparing a pupil for a non-prescribed examination outside school hours;

the cost of repair or replacement of property belonging to the Academy which is, in the Academy's reasonable determination, carelessly lost or wilfully damaged or destroyed by the pupil.

6. Status of activities, trips and residential visits

Before Parents are notified of the cost of an activity, trip or residential visit, the Academy must determine whether it is Educational or Non-Educational, as set out in the table below:

Status	Definition	Compulsory Charge	Voluntary Contribution
Educational	An activity, trip or residential visit which takes place wholly or mainly in school hours	No*	Yes
	An activity, trip or residential visit which takes place wholly or mainly outside school hours and is provided: as part of the National Curriculum	No*	Yes



	as part of the syllabus for a prescribed examination for which the pupil is being prepared by the Academy as part of statutory religious education;		
Non-Educational	An activity, trip or residential visit which takes place wholly or mainly outside school hours otherwise than as set out above	Yes	No
*Except for the cost of board and lodging on residential visits which is subject to a compulsory charge in both cases			

In order to determine whether an activity, trip or residential visit takes place mainly in or outside school hours, the '50% rule' must be applied as follows:

Type	The '50% Rule'
Activities and Trips	Where 50% or more of the actual time spent on the activity or trip (including travelling time, but excluding the lunch break) takes place in school hours , it is deemed to take place mainly in school hours . Where it is under 50% , it is deemed to take place mainly outside school hours .
Residential Visits	Firstly, the total number of half-days (a half-day being a 12 hour period ending at noon or midnight, rounded up or down as appropriate) spent on the residential visit are calculated. Secondly, the total number of school sessions (morning and afternoon) during the period of the residential visit (including travelling time) are calculated. Where the number of school sessions is 50% or more of the number of half-days, the visit is deemed to take place mainly in school hours . Where the number of school sessions is less than 50% of the number of half days, it is deemed to take mainly outside school hours .

For example, where pupils leave for a residential visit on immediately after school on Thursday during term time, and return on Tuesday at 12.00 noon the following week, the total number of half days will be ten and the total number of school sessions will be five. As the number of school sessions is 50% of the number of half-days, the residential visit is deemed to take place mainly in school hours and a compulsory charge cannot therefore be made (except for the cost of board and lodging).



7. Determining the level of costs

For all Educational and Non-Educational activities, trips and residential visits, the costs must be calculated to represent the actual cost per pupil (equally and proportionately).

The costs must not include:

- any administration costs incurred by the Academy in making the arrangements for an activity, trip or residential visit;
- any element of subsidy for other pupils (including those pupils for whom no payment is received, or who are eligible for statutory remission)
- any element of profit;
- any element of contingency (other than nominal, where it was not possible to accurately determine the actual cost in advance).

8. Compulsory charges

Where a compulsory charge is made for a Non-Educational activity, trip or residential visit, this must be paid in full by Parents for their child to be included. This includes the compulsory charge for board and lodging on educational residential trips where all other costs are requested by way of voluntary contributions.

Where the cost of an Educational residential visit includes a compulsory charge for board and lodging, together with voluntary contributions for all other costs, and Parents make payments to the Academy by way of a deposit and instalments, payments will be used to satisfy the voluntary contributions in full first, and the compulsory charge for board and lodging last.

9. Voluntary contributions

Where a voluntary contribution is requested for an Educational activity, trip or residential visit, it will be made clear to Parents in the letter sent to them setting out the costs of the trip and the voluntary contributions requested that they are under no obligation to pay and, if they do not, their child will not be excluded from the activity, trip or residential visit.

Letters requesting voluntary contributions will make it clear whether, if insufficient voluntary contributions are received, the activity, trip or residential visit will have to be cancelled, or whether the Academy is able to fund any shortfall.

10. Statutory remission for board and lodging on Educational residential visits

Section 457 EA 1996 provides that Parents who will be in receipt of certain State benefits or tax credits **at any point during a residential visit** are entitled to full remission of the compulsory charge made for board and lodging on Educational residential visits (as defined in the table above) only. This does **not** apply to Non-Educational residential visits.

Eligibility for statutory remission mirrors that for Free School Meals (**FSM**). A list of qualifying State benefits and tax credits can be accessed via the government's website. As such, the Academy will use the same entitlement verification procedures used for FSM to confirm eligibility for statutory remission.

Statutory remission is funded by the Academy.



11. Notifying parents of charges

Parents will be notified of all compulsory charges in advance of them being incurred (with the exception of the cost of repair or replacement of property as set out in section 5 above).

In relation to proposed activities, trips and residential visits, Parents will receive a letter or email setting out the details of the activity, trip and residential visit. In particular, the letter or email will include:

- confirmation as to whether the activity, trip or residential visit is deemed to be Educational or Non-Educational, as defined in Section 5 above;
- a breakdown of the costs involved (e.g. transport, buildings / venue, entrance fees, activities, board and lodging, insurance, etc.). These must reflect the actual cost per pupil (equally and proportionately);
- identification as to which costs are subject to a compulsory charge, and which costs are requested by way of a voluntary contribution;
- confirmation as to which costs, if any, are eligible for statutory remission for qualifying Parents;
- confirmation that, in respect of voluntary contributions, Parents are under no obligation to pay, and their child will not be excluded from the activity, trip or residential visit if it goes ahead (except where a compulsory charge for board and lodging is made, there is no eligibility for statutory remission and the charge remains unpaid);
- confirmation as to whether, if insufficient voluntary contributions are received (i.e. payment is not received in full for every available place), the activity, trip or residential visit will be cancelled, or whether the Academy has determined that it is able to fund any shortfall. There must not be any element of subsidy of one Parent by another Parent;
- confirmation of the date by which payment needs to be received, or the date by which the deposit and instalments need to be paid, where instalments are offered as an option;
- the order in which each payment received will be allocated to the cost elements for the activity, trip or residential visit. For residential visits involving a combination of compulsory charges and voluntary contributions, payments will be allocated as voluntary contributions first, and compulsory charges last. Where insurance is included, this will be purchased on receipt of the first payment (which may be set at a higher level as a result);
- confirmation as to which cost elements will be non-refundable once paid, as the Academy will not be able to recover these costs from the provider (e.g. insurance, booked non-refundable flights, booked non-refundable accommodation, etc.).

Parents are free to set up a standing order with their bank or building society for making payments in instalments if they wish, but are under no pressure to do so. The necessary details for setting up a standing order can be obtained from the Finance Director / School Business Manager.



12. Refunding payments

In the majority of cases, the Academy will only refund payments made by Parents where the costs to which the payment relates is recovered by the Academy from providers. This applies to voluntary contributions and compulsory charges.

Where costs cannot be recovered by the Academy, but insurance was included as part of the cost of the activity, trip or residential visit, Parents may be able to claim under the insurance policy in certain circumstances. The Trips Co-ordinator will assist the Parent in establishing whether there is cover, and in making a claim.

In exceptional circumstances, the Academy may at its discretion agree to refund some or all of the payments made by Parents which are not recoverable by the Academy, from its own funds. This will only be in cases where the cancellation of the child's inclusion on the activity, trip or residential visit was for an unavoidable and unforeseeable reason, and the pupil's family will suffer severe financial hardship if a full or partial refund is not made. These decisions will be made by the Headteacher in consultation with the Finance Director / School Business Manager to ensure a consistent and fair approach.

In the rare instances where it was not possible for the Academy to confirm the actual cost of an element of an activity, trip or residential visit in advance, and therefore had to provide Parents with an estimate, but the actual cost was lower than anticipated, the Academy will write to Parents to notify them of this and ask if they would like the surplus to be refunded to them, or would like it to be treated as a donation to the Academy's remission fund. Parents will not be placed under any pressure to refuse a refund.

13. Other charges outside the scope of this policy

The Academy has a separate School Uniform Policy which sets out the uniform requirements for pupils (including required PE kit) and where this can be purchased by Parents. In determining the Academy uniform, the Academy complies with the requirement to achieve the best value for money for Parents.

The Academy has a separate Lettings Policy which sets out the cost of hiring the Academy's rooms and sports facilities.

Lockers - are available for hire but are not compulsory. Details of these are sent out with the admissions pack. These are offered in line with Equality and Pupil Premium guidance with the associated remissions applied.

Personal and Protective Equipment (PPE) – in light of C-19 and any future Pandemic, BLDT will, if available, hold a stock of PPE (the type of which will be in accordance with Government guidance) for resale to students who are unable to source their own. This will be offered in line with Equality duties and responsibilities and with any associated remissions applied.

14. Equality

In implementing this policy, the Academy will have regard to its duties and responsibilities towards pupils and other persons with a protected characteristic (as defined by the Equality Act 2010). In particular, the Academy will ensure that the application of this policy does not discriminate (either directly or indirectly) against a pupil or other person with a protected characteristic.



Where the application of this policy would put a pupil or other person at a particular or substantial disadvantage compared to other pupils or persons because they or the other person are disabled (as defined in the Equality Act 2010), the Academy will adjust this policy or take other steps to avoid that disadvantage, where it is proportionate and reasonable to do so (e.g. make a 'reasonable adjustment').

An adjustment may be made in a number of different ways, depending on the particular circumstances involved. For example, the Academy may remit some or all of the compulsory charges and / or voluntary contributions requested, or it may agree to fund an additional member of staff or another adult (e.g. family member) being included in the activity, trip or residential visit in order to provide one-to-one support for a disabled pupil.

The Academy may also adjust this policy for pupils with special educational needs who are not disabled (as defined by the Equality Act 2010), where it is reasonable and proportionate to do so.

15. Data protection and confidentiality

The information created in connection with this policy may contain personal data. The Academy's use of this personal data will be in accordance with data protection law. The Academy has published privacy notices on its website which explain how the Academy will use personal data.

Staff must ensure that they follow the Academy's policies and procedures when handling personal data created in connection with this policy. This includes the Academy's Data Protection Policy.

For the avoidance of doubt, information about payments made to the Academy and, in particular, inability to pay and qualification for statutory remission will remain strictly confidential, and staff will only be made aware of this information on a 'need to know' basis.

16. Charges by third parties

On completion of satisfactory checks, the Academy may sometimes allow a third party to provide activities to pupils (e.g. music tuition, after school clubs, etc.). Those third parties are permitted to charge Parents for the activities offered, and any such charges do not fall under the remit of this policy (even where the Academy collects these payments on behalf of the third party for onward transmission).

17. Review and monitoring

This policy will be kept under regular review and monitored by the Academy Trust and Local Governing Bodies, particularly when there has been a change in legislation or DfE advice.

18. Version control

Date of adoption of this policy	October 2020
Date of last review of this policy	January 2024
Date for next review of this policy	January 2026