



ALDERMAN JACOBS PRIMARY SCHOOL (ACADEMY TRUST)

CHARGING AND REMISSION POLICY

Aims

The aims of this policy are 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 or request a voluntary contribution towards, from parents/guardians.
- Clarify how charges will be determined, so parents/guardians understand why requests for payment are sometimes made for some activities.

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'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.

Definitions

- Charge: a fee payable for specifically defined activities
- Remission: the cancellation of a charge which would normally be payable

Roles and responsibilities

- **The board of trustees:** The board of trustees has overall responsibility for approving the charging and remission policy, but can delegate this to a committee, an individual Trustee or the Headteacher. The governing board also has overall responsibility for monitoring the implementation of this policy. In Alderman Jacobs School the responsibility for approving the charging and remissions policy and monitoring the implementation of this policy has been delegated to the Audit and Risk Committee.

- **The Headteacher:** The Headteacher is responsible for ensuring staff are familiar with the charging and remissions policy, and that it is being applied consistently.
- **Staff:** Our staff are responsible for:
 - Implementing the charging and remission policy consistently
 - Notifying the Headteacher of any specific circumstances which they are unsure about or where they are not certain if the policy applies.
 - The Senior Leadership team will provide staff with appropriate training in relation to this policy and its implementation.
- **Parents:** Parents are expected to notify staff or the Headteacher of any concerns or queries regarding the charging and remissions policy.

Introduction

Schools may invite but not require parents to make voluntary contributions to the school's activities in order to enhance what is otherwise provided e.g school visits or journeys.

Charges may be made for the cost of activities provided outside school hours except where the activity is specifically required by external examination syllabus or national curriculum legislation.

Schools are prohibited from charging for any activity undertaken within normal school hours except for board and lodging on residential courses.

Where charges cannot be made

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 that the pupil is being prepared for at the school

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 local authority has arranged for pupils to be education
- 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

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

Activities partly during school hours

If 50 per cent or more of the time spent on the activity occurs during school hours, it is deemed to take place during school hours. Time spent on travel counts in this calculation if the travel itself occurs during school hours. School hours do not include the lunch break in the middle of the day.

Where less than 50% of the time spent on an activity falls during school hours, it is deemed to have taken place outside school hours. For example, an excursion might require pupils to leave school an hour before the school day ends, but the activity does not end until late in the evening.

Charges

We categorise trips at the school as 'Curriculum Related' and 'Entirely Optional' and ask for voluntary contributions for trips that are 'Curriculum Related'. A charge will be made for 'Entirely Optional' and no remission is available from the School. An alternative school based activity will always be provided for children who do not wish to participate in an 'Entirely Optional' trip.

Voluntary Contributions

In seeking voluntary contributions for curriculum related school activities, we make it clear to parents that:

- There is no obligation to contribute.
- Pupils will not be treated differently according to whether or not their parents have made a contribution.

In consequence we:

- Indicate the level of contribution required for the activity to take place.
- Consider that such contribution may include, for example, an element to cover the participation by pupils from low-income families or the cost of travel for accompanying teachers.
- Indicate that the activity may not take place if parents are reluctant to support it.

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.

Charitable Fundraising / Non uniform days

The School undertakes many fundraising activities. All donations are voluntary.

Where charges can be made

Education

- Any materials, books, instruments or equipment, where the child's parent wishes him or her to own them
- Optional extras
- Music and vocal tuition, in limited circumstances
- Certain early years provision
- Community facilities

Chargeable Activities

Activities outside school hours

Non-residential activities which take place outside school hours, but only if the majority of the time spent on that activity takes place outside school hours.

Residential activities

Board and lodging costs of overnight school trips. When any trip is arranged parents will be notified of the policy for allocating places.

Music tuition

Although the law states that all education provided during school hours must be free, music lessons are an exception to this rule. This is to allow pupils greater access to vocal and instrumental tuition. Charges may be made for teaching either an individual pupil or groups of any appropriate size to play a musical instrument or to sing during the school day, when requested by parents, as well as music tuition outside of the school day.

We will not charge for the above activities if the pupil is a Looked After Child

Concerts and Drama Performances

Some performances held during the evenings will be charged per person entry, with the proceeds usually supporting the production costs, the drama or music curriculum or for charity fundraising.

Breakages and Damages

The Trustees are entitled to require parents to pay for the cost of damage caused by the pupil's behaviour (e.g. breakage of a window, damage to furniture). This also applies to lost, damaged or defaced text books and resources.

Refunds

Trips

The school does not make a profit on trips or extra-curricular activities. Cancellation charges apply to all trips since charges are made by providers upon receipt of the first deposit so the school will be charged in full for the place reserved. Refunds are not given if a child cannot attend a trip or extra-curricular event unless a refund is issued by the provider. If a child is unable to attend at the last moment through illness, then a refund of cost may be given upon receipt of a doctor's certificate and only if issued by the provider. The initial deposit still remains non-refundable.

Residential Trips

The full payment is non-refundable in the event of your child's withdrawal from the trip. This includes costs associated with transport.

If the withdrawn place can be taken and fully paid for by another pupil then a refund can be given minus a £10 administration cost.

School Meals

The cut-off point for cancelling a school-provided meal is 10.30 am. Any meals cancelled after this time will still be charged to the parent via the usual methods. Our school meal provider, ABM Catering will charge Alderman Jacobs school for all meals ordered and we are unable to cover these costs from government-provided funds. ABM Catering are unable to offer a hot meal takeaway service and a refund can only be given if lunches are cancelled before 10.30am.

Remissions

In order to remove financial barriers from disadvantaged pupils, the board of trustees has agreed that activities and visits classed as 'Curriculum Related' or where charges can legally be made will be offered at a reduced charge to parents in particular circumstances. Set out below are the circumstances in which charges may be waived.

Parents in receipt of the following qualify for remission against the specified charges:

- Income Support or Income-Related Employment and Support Allowance
- Income-based Jobseeker's 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 HM Revenue and Customs) does not exceed the sum given in the Revenue and Customs rules
- Working Tax Credit run-on (this is paid for 4 weeks after an individual stops qualifying for Working Tax Credit)
- 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 including benefits)

For residential activities deemed to be Enrichment visits, such remissions are at the discretion of schools and their Trustees.

Resources

Parents will not be required to supply books, materials or other equipment for use in school hours, but parents are invited to assist with the provision of any basic items listed in the school prospectus.

Additional considerations

The school recognises its responsibility to ensure that the offer of activities and educational visits does not place an unnecessary burden on family finances. To this end we will try to adhere to the following guidelines:

- Where possible we shall publish a list of visits (and their approximate cost) at the beginning of the school term so that parents can plan ahead.
- We have established a system for parents to pay in instalments.
- When an opportunity for a trip arises at short notice it will be possible to arrange to pay by instalments beyond the payment plan final deadline.
- We acknowledge that offering opportunities on a 'first pay, first served' basis discriminates against pupils from families on lower incomes and if possible we will avoid that method of selection.

Procedures for complaints regarding the implementation of the Policy

The procedure for complaints is outlined in the School's Complaints Policy, which should be consulted prior to any complaint being made.

Links to other policies

Debt Management

Statutory/Non-Statutory							
Created/Updated/ Reviewed		Ratified		Review Frequency	Next Review Date	Signed by	
By	Date	By	Date			Head	Chair
Jocelyn Sumner	Spring 2023	Trustee Meeting	11 th January 2023	1 Year	Spring 2024	<i>Cathy Carlisle</i>	<i>Atlland</i>

Appendix 1

The following statement will be included on letters related to educational trips, visitors into schools and requests for payments:

I have read, understood and accept the schools charging and remissions policy (available on the school website)