

September 2024

Next Review date: September 2026

Charging and Remissions Policy

This policy applies to all academies managed by Wootton Academy Trust (WAT).



**Wootton
Academy Trust**

Person responsible: Chief Finance and Operating Officer

Reviewed by: Finance Committee

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1. Aims.

Our 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'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.

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 The Trust Board

The Trust Board has overall responsibility for approving the charging and remissions policy, but can delegate this to a Trustee Committee. The trust board also has overall responsibility for monitoring the implementation of this policy. Responsibility for approving the charging and remissions policy has been delegated to the Trust Finance Committee. Monitoring the implementation of this policy has been delegated to the Finance Committee.

4.2 Chief Finance and Operating Officer

The Chief Finance and Operating Officer is responsible for ensuring staff are familiar with the charging and remissions policy, and that it is being applied consistently.

4.3 Staff

Staff are responsible for:

- Implementing the charging and remissions policy consistently;
- Notifying the Chief Finance and Operating Officer of any specific circumstances that they are unsure about or where they are not certain if the policy applies;

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

4.4 Parents/ carers

Parents/carers are expected to notify staff or the Head of School/ College of any concerns or queries regarding the charging and remissions policy.

5. Where charges cannot be made.

Below we set out what we **cannot** charge for:

5.1 Education

- Admission applications;
- Education provided during school/ college hours (including the supply of any materials, books, instruments or other equipment);
- Education provided outside school/ college 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/ college
 - 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/carer;
- Entry for a prescribed public examination if the pupil has been prepared for it at the school/ college;
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school/ college.

5.2 Transport

- Transporting registered pupils to or from the school premises, where the local authority (LA) has a statutory obligation to provide transport
- Transporting registered pupils to other premises where the trust board or LA has arranged for pupils to be educated
- Transport that enables a pupil to meet an examination requirement when they have 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.

6.1 Education

- Any materials, books, instruments or equipment, where the child's parent/carer wishes the child 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.

6.2 Optional extras

We are 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 LA or trust 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/carers 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 that is to be charged for.

6.3 Music tuition

Schools 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/carer. Charges may not exceed the cost of the provision, including the cost of the staff giving the tuition.

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

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

7. Voluntary contributions.

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

- School Trips that are planned during school curriculum time or are closely associated with learning objectives that form part of the school curriculum.

There is no obligation for parents/carers to make any contribution, and no child will be excluded from an activity if their parents/carers are unwilling or unable to pay.

If the school/ college is unable to raise enough funds for an activity or visit then it will be cancelled.

8. Financial support for disadvantaged pupils.

The Trust will ensure no pupil is unable to participate in activities that form part of the school's core enrichment entitlement as a result of being unable to pay. School/ College will proactively endeavor to ensure that all pupils participate and will support this however possible.

Subsidies or full remission should be considered for pupils who attract the pupil premium or are otherwise unable to make a financial contribution. In planning their enrichment entitlement, school/ college should consider the wide variations in family income of their cohort, alongside the necessity to avoid additional, unexpected burdens on the school/ college budget.

9. Activities we charge for.

Where available, the school can charge for the following activities:

- After School Clubs – where the charges are set to cover the cost of staffing, direct costs and overheads including utilities and insurance;
- Wrap Around Care – where the charges are set to cover the cost of staffing, direct costs and overheads.

Prices for all activities are reviewed on a termly basis by the trust executive and published in advance of each term.

10. 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 Trust Board and will depend on the activity in question.

11. Monitoring arrangements.

The CFOO monitors charges and remissions and ensures these comply with this policy. This policy will be reviewed by the CFOO every two years.

At every review, the policy will be approved by the Finance Committee.