



Southernly Point Co-operative Multi-Academy Trust Charging & Remissions Policy

Equality Impact Assessment

The EIA has not identified any potential for discrimination or adverse impact and all opportunities to promote equality have been taken.*	✓
The EIA has not identified any conflict with the Trust's co-operative values and the Church Schools' values.	✓
Adjust the policy to remove barriers identified by the EIA or better promote equality.	✓

*Inclusive of protected characteristics

Provenance	Date
Working Party	Feb / March 2020
HR checks	
Union Consultation	
Trustees' Ratification	March 2020
Implementation	March 2020

Review Date
March 2022

To be read in conjunction with:	DfE Charging for School Activities [May 2018] Education Act 1996 [Sections 449-462] Charges for Music Tuition [England] Regulations 2007
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Self Help **Self Responsibility** **Equity** **Equality** **Democracy** **Solidarity**
Social Responsibility **Honesty** **Openness** **Caring for Others**

Southerly Point Co-operative Multi-Academy Trust

Charging & Remissions Policy

1. Rationale

Southerly Point Co-operative Multi-Academy Trust [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 be made.

2. Legislation

This policy is based on advice from the Department for Education [DfE] on charging for school activities and the Education Act 1996, sections 449-462, which sets out the law on charging for school activities in England. Trusts are required to comply with this Act through their Funding Agreements.

This policy complies with the Trust Funding Agreement and Articles of Association.

3. Definitions

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

4. Roles and Responsibilities

4.1 The Trustees

The Trustees have overall responsibility for approving the Charging and Remissions Policy but have delegated this responsibility to the Finance and Resources Committee.

4.2 The Executive Leader/Accounting Officer

The Executive Leader/Accounting Officer has overall responsibility for monitoring the implementation of this policy but has delegated this responsibility to the CFO.

4.3 The CFO

The CFO is responsible for monitoring the implementation of this policy and to review annually, the chargeable rates that the schools are required to apply. This review will take place during the spring term in time for the start of the new academic year the following September. The CFO will provide staff with appropriate training in relation to this policy and its implementation.

4.4 The Headteacher/SLT

The Headteacher/SLT is responsible for ensuring staff are familiar with the Charging and Remissions Policy, and that it is applied consistently.

4.5 Staff

Staff are responsible for:

- Implementing the Charging and Remissions Policy consistently
- Notifying the CFO and/or Central Finance Team of any specific circumstances which they are unsure about or where they are not certain if the policy applies.

4.6 Parents

Parents are expected to notify staff or the Headteacher/SLT of any concerns or queries regarding the Charging and Remissions Policy.

5. Charging for Education

5.1 The Trust/School will not charge parents for:

- Admission applications.
- Education provided during school hours.

- Education provided outside school hours if it is part of the national curriculum, part of a syllabus for a prescribed public examination that the pupil is being prepared for by the school, or part of religious education.
- Instrumental or vocal tuition, unless provided at the request of the pupil's parents.
- Entry for a prescribed public examination, if the pupil has been prepared for it at the school.
- Examination re-sits, if the pupil is being prepared for the re-sits at the school.

5.2 The Trust/School may charge parents for the following:

- Materials, books, instruments or equipment, where they desire their child to own them.
- Optional extras.
- Music and vocational tuition [in certain circumstances].
- Use of community facilities.

6. Optional Extras

6.1 The Trust/School may charge parents for the following optional extras:

- Education provided outside of school time that is not:
 - Part of the national curriculum
 - Part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school
 - Religious education.
- Examination entry fees where the pupil has not been prepared for the examinations at the school.
- Transport other than that required for the pupil to be provided with compulsory education.
- Board and lodging for a pupil on a residential visit.
- Extended day services [Breakfast Clubs, After School Clubs and Nursery Care] offered to pupils.

6.2 When calculating the cost of optional extras, the Trust/School will only take into account the following:

- Materials, books, instruments or equipment provided in relation to the optional extra.
- The cost of buildings and accommodation.
- The employment of non-teaching staff.
- The cost of teaching staff [including supply teachers] under contracts for services purely to provide an optional extra.
- The cost, or an appropriate proportion of the costs, for teaching staff employed to provide vocal tuition or tuition in playing a musical instrument.

6.3 The Trust/School will not charge in excess of the actual cost of providing the optional extra divided by the number of participating pupils. We will not charge a subsidy for any pupils wishing to participate but whose parents are unwilling or unable to pay the full charge. If a proportion of the activity takes place during school hours, we will not charge for the cost of alternative provision for those not participating.

6.4 Participation in any optional activity will be on the basis of parental choice and a willingness to meet the charges. Therefore, parental agreement is a pre-requisite for the provision of an optional extra.

7. Examination Fees

7.1 The Trust/School may charge for examination fees if:

- The examination is on the prescribed list [which includes SATs, GCSEs and A levels] but the pupil was not prepared for it at the Trust/School.
- The examination is not on the prescribed list, but the Trust/School arranged for the pupil to take it.
- A pupil fails, without good reason, to complete the requirements of any public examination where the Trust/School originally paid or agreed to pay the fee.

8. Examination Re-sits

- 8.1** Where a pupil is entered for a second or subsequent attempt at an examination, the parent/pupil will be required to pay the fee.
- 8.2** If a pupil or their parents consider it to be in the best interests of the pupil to request that an examination is re-marked, any fees involved must be covered by the pupil or their parents. If the awarding body changes the overall grade of the result, the school will not be charged by the awarding body and the parent/pupil will have their fees refunded.

9. Voluntary Contributions

- 9.1** The Trust/School may, from time-to-time, ask for voluntary contributions towards Trust/School activities. If an activity cannot be funded without voluntary contributions, the Trust/School will make this clear to parents at the outset. The Trust/School will also make it clear that there is no obligation for parents to make a contribution, and notify parents whether assistance is available.
- 9.2** No child will be excluded from an activity simply because their parents are unwilling or unable to pay. If a parent is unwilling or unable to pay, their child will still be given an equal opportunity to take part in the activity. If insufficient voluntary contributions are raised to fund an activity, and the Trust/School cannot fund it via another source, the activity will be cancelled.
- 9.3** The Trust/School will strive to ensure that parents do not feel pressurised into making voluntary contributions.

10. Music Tuition

- 10.1** Music tuition is the only exception to the rule that all education provided during school hours must be free. The Charges for Music Tuition [England] Regulations 2007 allow for charges to be made for vocal or instrumental tuition provided either individually or to groups of any size – provided that the tuition is at the request of the pupil's parents.
- 10.2** The charges will not exceed the cost of the provision, including the cost of the staff providing the tuition.

11. Transport

11.1 The Trust/School will not charge for:

- Transporting registered pupils to or from the Trust/School premises, where the LA has a statutory obligation to provide the transport.
- Transporting registered pupils to other premises where the Trust/School or LA has arranged for pupils to be educated.
- Transporting pupils to meet an examination requirement when they have been prepared for the examination at the Trust/School.
- Transport provided in connection with a statutory educational visit.

12. Residential Visits

12.1 The Trust/School will not charge for:

- Education provided on any visit that takes place during school hours.

- Education provided on any visit that takes place outside Trust/School hours if it is part of the national curriculum, part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education.
- Supply teachers to cover for teachers accompanying pupils on visits.

12.2 The Trust/School may charge for board and lodging – but the charge will not exceed the actual cost.

12.3 The remission of charges for board and lodging payments is the responsibility of the Trust/School. These costs will be borne by Trust/School funds.

13. Education Partly During School Hours

13.1 If 50 percent or more of the time spent on an activity occurs during Trust/School hours [including time spent travelling if the travel occurs during Trust/School hours], it is deemed to take place during school hours and no charge will be made.

13.2 If less than 50 percent of the time spent on an activity occurs during Trust/School hours, it is deemed to have taken place outside school hours and the Trust/School may charge for the activity. However, the Trust/School will not charge if the activity is part of the national curriculum, part of a syllabus for a prescribed public examination that the pupil is being prepared for at the Trust/School, or part of religious education.

13.3 The remission of charges for Trust/School activities is the responsibility of the Trust/School. These costs will be borne by Trust/School funds.

13.4 The Trust/School may charge for extended day services, less any remissions that apply to individual pupils, see Trust/School remissions criteria, below.

14. Damaged or Lost Items

14.1 The Trust/School may charge parents for the cost of replacing items broken, damaged or lost due to their child's behaviour.

15. Uniform

15.1 When a School sells uniform, the School/Trust will make a charge for items purchased by parents, but this charge must not exceed the actual cost of purchasing the uniform from the supplier.

16. Remissions

16.1 In some circumstances, the Trust/School may not charge or reduce the charge for items or activities set out in this policy. This will be at the discretion of the Trustees and will depend on the activity in question.

16.2 Remission Criteria and Rates

The table below shows the remission rates that are applied within the Trust/School:

Item	Free School Meals Children	Looked After Children	Ever 6 Children	Post Looked After Children
Educational materials parents, wish child to own.	25% Remission	50% Remission	15% Remission	15% Remission
Damage or defacing of Trust/School property.	0% Remission	0% Remission	0% Remission	0% Remission

Residential trips.	50% Remission [max £100 trip]	50% Remission [max £100 trip]	25% Remission [max £50 trip]	25% Remission [max £50 trip]
Breakfast Club and/or After School Club.	25% Remission	25% Remission	15% Remission	15% Remission
*Music Tuition [when provided by Cornwall Music Education Trust].	100% Remission [max £5 lesson]	100% Remission [max £5 lesson]	25% Remission [max £1.25 lesson]	25% Remission [max £1.25 lesson]
Music Tuition [when provided by independent music teacher].	50% Remission [max £2.50 lesson]	50% Remission [max £2.50 lesson]	25% Remission [max £1.25 lesson]	25% Remission [max £1.25 lesson]
Nursery Care	0% Remission	0% Remission	0% Remission	0% Remission

** If music tuition is provided by the Cornwall Music Education Trust there is also a 50% remission [max. £2.50 per lesson] if one or more parents/carers in the household are currently serving in the British armed forces. Or the parent/carer in the child's household or the child learning is in receipt of Disability Living Allowance [Personal Independence Payment].*

17. Arrangements for Monitoring and Evaluation of the Charging and Remissions Policy

17.1 The Trustees will monitor the impact of this policy every two years by receiving a financial report provided by the CFO on those activities that resulted in charges being levied, the cost of the remissions awarded [without giving names] and the source of funding for those remissions. The Trustees will give due consideration for the pupils most in need of additional support and decide whether the charging and remissions rates and criteria need to be altered.

Trust/School Charges

Item	Charge
Educational materials parents, wish child to own.	Cost price less appropriate remission applicable.
Damage or loss of Trust/School property.	Cost price less appropriate remission applicable.
Residential trips.	Cost price less appropriate remission applicable.
Music Tuition [when provided by Cornwall Music Education Trust].	Cost price less appropriate remission applicable.
Music Tuition [when provided by independent music teacher].	Cost price less appropriate remission applicable.