



**SOUTH WESTMORLAND
MULTI ACADEMY TRUST**

Charging and Remissions Policy

Committee:	Risk, Audit & Finance Committee
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Review Sheet

The information in the table below details earlier versions of this document with a brief description of each review and how to distinguish amendments made since the previous version date (if any).

Version Number	Version Description	Date of Review
1	Original – based on latest DfE guidance (October 2013)	30/04/2014
2	Risk Audit & Finance Committee review	23/03/2017
3	Risk Audit & Finance Committee review (DfE guidance May 2018)	27/02/2020
4	Risk Audit & Finance Committee review (updated DfE guidance)	04/03/2021
5	Risk Audit & Finance Committee review	03/03/2022
6	Risk Audit & Finance Committee review	07/03/2023
7	Risk Audit & Finance Committee review – no change	05/03/2024

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1. Rationale

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 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.

This policy complies with our funding agreement and articles of association.

2. Purpose

The aim of this policy is to set out what charges will be levied for activities, what remissions will be implemented and the circumstances under which voluntary contributions will be requested from parents:

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

3. Roles and Responsibilities

3.1 The MAT Board

The MAT Board has overall responsibility for approving the charging and remissions policy, but has delegated responsibility for monitoring and recommending approval to Risk, Audit and Finance Committee.

3.2 Headteachers

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

3.3 Staff

Staff are responsible for:

- Implementing the charging and remissions 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 school will provide staff with appropriate training in relation to this policy and its implementation.

3.4 Parents

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

4. Implementation

4.1 Prohibition of Charges

4.1.1 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 (although academy trusts don't have to follow the national curriculum, you still can't charge for education that is part of the national curriculum), or part of a syllabus for a prescribed public examination that the student is being prepared for at the school, or part of religious education
- instrumental or vocal tuition, for students learning individually or in groups, unless the tuition is provided at the request of the student's parent
- entry for a prescribed public examination, if the student has been prepared for it at the school

- examination re-sit(s) if the student is being prepared for the re-sit(s) at the school

4.1.2 Transport

- transporting registered students to or from the school premises, where the local education authority would have a statutory obligation to provide transport
- transporting registered students to other premises where the local advisory committee has arranged for students to be educated
- transport that enables a student to meet an examination requirement when he/she has been prepared for that examination at the school
- transport provided in connection with an educational trip

4.1.3 Residential Visits

- education provided on any trip that takes place during school hours if it is part of the national curriculum, or part of a syllabus for a prescribed public examination that the student is being prepared for at the school
- education provided on any trip that takes place outside school hours if it is part of the national curriculum, or part of a syllabus for a prescribed public examination that the student is being prepared for at the school, or part of religious education
- supply teachers to cover for those teachers who are absent from school accompanying students on a residential trip

4.1.4 School Milk Scheme (This applies to all children aged 5-18 who are entitled to a free school meal)

Under *'The Requirements for School Food Regulations 2014'*, we will make lower fat milk or lactose reduced milk available for drinking at least **once** a day during school hours at a fair cost or free of charge to all pupils who are entitled.

Up to one third of a pint of milk is available to all children free of charge, regardless of their family circumstances up to the age of 5.

When a child has their 5th birthday, a small charge of 24p per day will be made towards the cost of continuing to provide milk. Children who have reached the age of 5 and have not yet reached the age of 19 can continue to receive free school milk if their family is in receipt of one of the prescribed benefits listed in Section 6.

Following changes in legislation in 2015 regarding the availability of milk at school, all infant children who are entitled to a free school meal under the Universal Free School Meals Scheme can also now choose milk with a fat content of no more than 1.8% as part of their free meal at lunchtime. All children not eligible for free school meals can also choose to drink milk as part of the school dinner that parents pay for.

4.1.5 School Meals

School meals are available free of charge to those students whose family is in receipt of one of the prescribed benefits, up to the value of £2.80 per day. Information on how to apply for free school meals can be found at: <https://www.gov.uk/apply-free-school-meals>.

4.1.6 Music Tuition

Although the law states that, in general, all education provided during school hours must be free, instrumental and vocal music tuition is an exception to that rule.

The Charges for Music Tuition (England) Regulations 2007 set out the circumstances in which charges can be made for tuition in playing a musical instrument, including vocal tuition. They allow charging for tuition in larger groups than was previously the case.

Charges may now be made for vocal or instrumental tuition provided either individually, or to groups of any size, 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 who provide the tuition.

The regulations make clear that charging may not be made if the teaching is an essential part of the national curriculum. They also make clear that no charge may be made in respect of a pupil who is looked after by a local authority.

4.2 Charges

4.2.1 Education

- any materials, books, instruments, or equipment, where the student's parent wishes him/her to own them
- optional extras (see 4.2.2)
- music and vocal tuition requested by the student's parent (charges may not exceed the cost of the provision, including the cost of staff who provide the tuition)
- community facilities provided under section 27 of the Education Act
- to cover the cost of materials/ingredients for subjects such as design or food technology where parents have indicated in advance they would like their child to bring the finished product home

4.2.2 Optional Extras

Charges may be made for some activities that are known as 'optional extras'. Where an optional extra is being provided, a charge can be made for providing materials, books, instruments, or equipment. Optional extras include:

- 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 student is being prepared for at the school
 - part of religious education
- examination entry fee(s) or resits if the registered student has not been prepared for the examination(s) at the school
- transport (other than transport that is required to take the student to school or other premises where the MAT Board have arranged for the student to be provided with education)
- board and lodging on residential visits (not to exceed the costs)
- extra-curricular activities and school clubs
- breakages and replacements as a result of damages caused wilfully or negligently by students
- any other education, transport or examination fee unless charges are specifically prohibited

In calculating the cost of optional extras an amount may be included in relation to:

- materials, books, instruments, or equipment provided in connection with the optional extra
- cost of buildings and accommodation
- non-teaching staff
- teaching staff engaged 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 musical or vocational tuition where this is an optional extra
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- Any charge made to individual students must not exceed the actual cost of providing the optional extra activity and must be divided equally by the number of students participating. It must not

include an element of subsidy for any other students wishing to participate in the activity whose parents are unwilling or unable to pay the full charge.

4.2.3 State Boarding Schools

- overnight boarding and lodging
- extended day services offered to day students, for example breakfast clubs, after school clubs, tea and supervised homework sessions

4.3 Remissions

Children whose parents who can prove they are in receipt of the following benefits will be exempt from paying the cost of board and lodging during residential trips:

- Income Support
- Income-based Jobseeker's Allowance
- Income-related Employment and Support Allowance
- Support under part VI of the Immigration and Asylum Act 1999
- The guaranteed element of Pension Credit
- Child Tax Credit (provided that Working Tax Credit is not also received and the family's annual gross income does not exceed £16,190)
- 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 not including any benefits)

- Dallam School Charitable Trust provide an annual donation to assist with the cost of residential trips to ensure that no pupil is prevented from taking part due to financial hardship. The entitlement is at the discretion of the Headteacher.

4.4 Voluntary Contributions

Academy schools are legally allowed to ask for voluntary contributions for the benefit of the school or any school activities. Academy Headteachers are responsible for ensuring parents are made aware that there is no obligation to make any contribution, but if an activity cannot be funded without voluntary contributions, then it will not take place.

The protocol for voluntary contributions is:

- Parents will be invited to make voluntary contributions for school activities in or out of school time for which compulsory charges cannot be levied but which can only be provided if there is sufficient voluntary funding, whilst ensuring that no student is excluded from such activity by reason of inability or unwillingness to make a voluntary contribution
- The terms of any request made to parents will specify that the request for a voluntary contribution in no way represents a charge. In addition, the following will be made clear to parents:
 - that the contribution is genuinely voluntary and a parent is under no obligation to pay
 - that registered students at the school will not be treated differently according to whether or not their parents have made any contribution in response to the request
- Voluntary contributions may be used to fund:
 - board and lodging
 - travel
 - materials and equipment
 - staffing costs (including administration costs)
 - entrance fees
 - insurance costs

- It is also the policy of the MAT Board to:
 - leave to Academy Headteachers discretion the proportion of costs of an activity which should be charged to public or non-public funds
 - delegate to Academy Headteachers the determination of any individual case arising from the implementation of this policy

5. Review

This policy is formally reviewed by the Risk, Audit & Finance Committee on an annual basis.