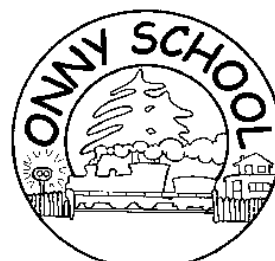


*St. Michael's  
Federation*



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## **Charging and Remissions Policy**

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Date Approved: Feb 2024  
Version 3.0  
Review Date: Feb 2025

## **Statement of intent**

The Diocese of Hereford Multi-Academy Trust('Trust') and St Michaels Federation (Lydbury North and Onny CofE Primary Schools) is committed to ensuring equal opportunities for all pupils, regardless of financial circumstances, and has established the following policy and procedures to ensure that no child is discriminated against by our offering of academy trips, activities and educational extras.

In addition, we are committed to adhering to legal requirements regarding charging for academy activities, and meeting all statutory guidance provided by the DfE.

We undertake to:

- Not charge for education provided during academy hours.
- To inform parents/carers on low incomes and in receipt of relevant benefits of the support available to them when asking for contributions.

## **Legal framework**

This policy will have consideration for, and be compliant with, the following legislation and statutory guidance:

- Education Act 1996 sections 449 to 462
- DfE Statutory policies for schools and academy trusts
- The Trust's Funding Agreement and articles of association

## 1.0 Introduction

- 1.1 The purpose of this policy is to set what charges can and cannot be made for activities in academies in the Trust. The policy has been drawn up in accordance with Sections 449-462 of the Education Act 1996, which sets out the law regarding what charges, can and cannot be made for activities in schools maintained by Local Authorities, but which also apply to the Trust, as set out in the Master Funding Agreement with the Secretary of State.
- 1.2 The Trust and Local Academy Board ('LAB') recognises the valuable contribution that the wide range of additional activities, including trips, clubs and residential experiences, can make towards pupils' education.
- 1.3 The Trust and the LAB aims to promote and provide such activities, both as part of a broad and balanced curriculum, for the pupils of the academy, and as additional optional activities. However, due to the limits to funding the Trust and LAB reserves the right to request voluntary contributions from parents/carers.

## 2.0 Aims

- 2.1 This policy sets out the Trust and its academies attitude to charging, describes each type of activity that will be charged for, and explains when charges will be made, and where the Trust will minimize the financial barriers that may prevent some pupils from taking full advantage of opportunities.

## 3.0 Principles

- 3.1 Day to day educational provision is free. This includes resources and equipment used within lessons in the delivery of the National Curriculum.
  - 3.1.1 The academy may invite parents/carers from time to time to make a voluntary contribution towards any part of the academy's work, and to allow the provision of additional activities, which might not otherwise be possible. Parents/carers will be informed of the decision to ask for contributions at the planning stage of activities. Planned activities may be cancelled if financial support is not forthcoming. No pupil will be left out of any compulsory curriculum activity provided in academy time because his/her parents/carers cannot or will not make a voluntary contribution.
- 3.2 The Trust and LAB have noted that the Education Act 1996 allows charges to be made in the following areas:
  - a. Education provided outside of academy 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 academy.

- Religious education.
- b. Examination entry fees where the pupil has not been prepared for the examinations at the academy.
  - c. Transport, other than that arranged by the Local Authority (“LA”) for the pupil to be provided with education
  - d. Board and lodging for a pupil on a residential visit
  - e. Extended day services offered to pupils
- 3.3 When calculating the cost of optional extras, the academy will only take into account the following:
- a. Materials, books, instruments or equipment provided in relation to the optional extra
  - b. The cost of buildings and accommodation
  - c. The employment of non-teaching staff
  - d. The cost of teaching staff (including teaching assistants) under contracts for services purely to provide an optional extra
  - e. Individual instrumental tuition not related to the National Curriculum or to prescribed public examinations.
  - f. The academy 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/carers are unwilling or unable to pay the full charge. If a proportion of the activity takes place during academy hours, we will not charge for the cost of alternative provision for those not participating.
  - g. 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.
  - h. Materials used in ‘craft subjects’, subject to the parents/carers having agreed in advance they wish to own the finished product
  - i. Board and lodging charges at any time (in academy time, or otherwise) subject to full remission to those parents/carers in receipt of:
    - Income Support
    - Income-based Jobseekers Allowance
    - Income-related Employment and Support Allowance
    - Support under Part VI of the Immigration and Asylum Act 1999
    - The guaranteed element of State Pension Credit
    - Child Tax Credit (provided you’re not also entitled to Working Tax Credit and have an annual gross income of no more than £16,190)
    - Working Tax Credit -paid for 4 weeks after you stop qualifying for working tax credit
    - Universal Credit - if you apply on or after April 2018, your household income must be less than £7,400 a year (after tax and not including any benefits you get)

- j. Residential visits taking place, or deemed to take place in, 'academy time'
  - k. Results of public examinations, where no further preparation has been provided by the academy
- 3.4 The Trust and its academies wish to try and ensure that the variety of visits and activities established at the academy continue, but emphasise that this can only happen with full support, and that activities will either be substantially reduced, or cease altogether, if parents/carers are not prepared to contribute voluntarily.
- 3.4.1 The Trust and LAB note that parents/carers are not debarred from making voluntary contributions towards the costs of board and lodgings, if they so wish in any situation, including those in receipt of Income Support, Income-based Jobseeker's Allowance, support under part IV of the Immigrant and Asylum Act 1999, or Child Tax Credit, providing the annual family income does not exceed £16,190 or Universal Credit.
- 3.5 The Trust and the LAB notes that the Education Act 1996 prescribes:
- 3.5.1 that no charges may be levied for academy activities taking place or deemed to take place in academy time, if they are essential to the curriculum
  - 3.5.2 that voluntary contributions must be genuinely voluntary
  - 3.5.3 that there is no obligation on parents/carers to contribute, and that pupils will not be treated differently according to whether or not their parents/carers have made any contributions
- 3.6 The Trust and LAB recognises that, in general, participation in all trips and visits are voluntary and notwithstanding the charging requirement, parents/carers have the right, for whatever other reasons, to choose that their child does not participate.
- 3.7 Should participation in any trip be essential for the fulfilling of the academy's duties relating to the National Curriculum, public examinations or the provision of religious education, parents/carers will be informed on the occasion of each trip. In these cases, the full cost of the trip will be met by the academy, less any voluntary contribution parents/carers may be prepared to make.
- 3.8 The Charging and Remissions Policy for the Trust for the time being, remain as follows:
- 3.8.1 The Trust along with the LAB reserve the right to make charges, where the law allows, and as set out with the principles of this policy shown in section 3.
  - 3.8.2 Individual instrumental tuition can be accommodated at the wishes of parents/carers, on the understanding that parents/carers meet the full costs involved.
  - 3.8.3 From time to time, it may be possible for the costs of trips and activities to be subsidised, either wholly, or in part, from other non-government or ring-fenced monies, ie fundraising, donations. Parents/carers will be informed when these occasions arise.

## 4.0 Breakages

4.1 The academy may charge parents for the cost of replacing items broken, damaged or lost (which may include labour costs) due to their child's behavior.

## **5.0 Review**

5.1 This policy will be reviewed on an annual basis by the Trust and will be adjusted in line with any subsequent guidelines from the Department for Education.

## **6.0 Individual, academy-specific chargeable aspects or remissions**

*Academies should list chargeable aspects or additional remissions that are not covered under this generic policy and that are specific to their school; the Trust is mindful that individual schools also have their own planning and impact statements for disadvantaged students, which may lead to support of students outside of this policy.*