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## CHARGING AND REMISSIONS POLICY (KSMAT/STAT/056)

<b>Committee Responsible:</b>	Directors of Keswick School Multi-Academy Trust
<b>Lead Officer:</b>	Chief Financial Officer
<b>Date of Review:</b>	March 2024
<b>Date to be Reviewed:</b>	March 2026
<b>Signed:</b>	D Hammond
<b>Date:</b>	20/03/2024

# CHARGING AND REMISSIONS POLICY

## 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 Revision
1	Original	October 2015
2	Clarify remit of policy, define remission with examples, inclusion of school milk scheme for those eligible for FSM.	December 2017
3	General policy revision to improve clarity and consistency. New insertion of paragraphs 3.4 and 3.8.	June 2018
4	Paragraph 1.3 amended to reflect amended school day during Covid-19 pandemic. Clarify reference to music tuition in paragraph 3.1. Update to paragraph 3.3 regarding examination resits. Paragraph 6.2 updated to reflect relevant benefits.	November 2020
5	References to Keswick School replaced with the Trust as this is a MAT policy. Paragraph 1.3 reverted to original. Paragraph 14.2 updated to refer to the Academy Trust Handbook and the ESFA.	November 2022
6	Aligned to Kym Allan Charging and Remissions Policy v10	March 2024

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# CHARGING AND REMISSIONS POLICY

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# CHARGING AND REMISSIONS POLICY

## 1.0 POLICY SCOPE

- 1.1 Sections 449 to 462 of the [Education Act 1996 \(legislation.gov.uk\)](#) and [The Education \(School Sessions and Charges and Remissions Policies\) \(Information\) \(England\) Regulations 1999 \(legislation.gov.uk\)](#) set out the law on charging and remissions for school activities in England and require schools to have a policy on charging. [The Education \(Charges for Early Years Provision\) Regulations 2012 \(legislation.gov.uk\)](#) sets out when charges can be made for some early years provision.
- 1.2 This policy is based on the law and Department for Education (DfE) guidance [Charging for school activities - www.gov.uk](#) . Academies are required to comply with this Act through their funding agreements so, this policy complies with our funding agreement and articles of association.
- 1.3 Section 21 of the [Education Act 2002 \(legislation.gov.uk\)](#) gives schools the power to provide community facilities or services for the (charitable) benefit of pupils or their families, or people who live or work locally. This policy does not apply to charges we make for community facilities which are handled separately under hire agreements.
- 1.4 This policy does not apply to charges made and determined by other organisations offering activities and services on the school premises e.g. a community club that hires our hall to meet in and charges its members to attend.
- 1.5 Keswick School Multi Academy Trust (“the Trust”) recognises the valuable contribution that a variety of opportunities, including trips, residential experiences and extra-curricular activities can make towards the education of our pupils.
- 1.6 This policy aims to ensure that:
- All pupils have full and free access to a broad and balanced curriculum regardless of their family’s financial means.
  - The Trust is transparent about the activities or items that can be charged for and when charges will be made, or remissions offered.
  - We recognise our responsibility not to place undue pressure on family finances for example, by giving good notice about charges and by not offering activities on a ‘first to pay, first served’ basis.
- 1.7 We recognise our responsibility to ensure that the offer of activities and educational visits does not place an unnecessary burden on family finances and where we can we aim to:
- publish a list of visits and their estimated cost across all year groups at the beginning of the academic year;
  - ensure our payment systems allow parents to pay in instalments;
- 1.8 Where this Policy refers to “parents”, we mean any person with parental responsibility for a child.
- 1.9 Where this policy refers to a “charge”, this is a fee payable for clearly defined items or activities.
- 1.10 Where this policy refers to a “voluntary contribution”, this is an amount of money that school would like families to contribute towards the cost of an opportunity. There is no obligation to pay a voluntary contribution but without enough contributions, an activity might be cancelled.

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- 1.11 Where this policy refers to “remission”, this is an amount of money that school will or might agree to provide to fund an opportunity for a child. The Trust will make provision for statutory remission requirements e.g. using the relevant Pupil Premium funding to pay for a child with a legal entitlement.
- 1.12 Where this policy refers to a “half-day school session”, this is any period of 12 hours ending at noon or midnight (page 9, [Charging for school activities - www.gov.uk](http://www.gov.uk), 2018).
- 1.13 This policy should be read in conjunction with the following policies and procedures:
- Academy Trust Handbook
  - Trips and Visits Policy (KS/CUR/076)
  - Equality Policy (KSMAT/STAT/007)
  - Exams Policy (KS/CUR/050)

## 2.0 ROLES AND RESPONSIBILITIES

- 2.1 The Trust Board has overall responsibility for approving the Charging and Remissions Policy.
- 2.2 The Trust Board also has overall responsibility for monitoring the implementation of this policy.
- 2.3 Head teachers are responsible for ensuring staff are familiar with the Charging and Remissions Policy and that it is being applied consistently.
- 2.4 The Charging and Remissions Policy and how to implement it is included in the induction of new staff and the senior leadership team will provide updates or refresh training as necessary.
- 2.5 Our staff are responsible for:
- Implementing the policy consistently.
  - Notifying the headteacher of any specific circumstances which they are unsure about or where they are not certain if the policy applies.

## 3.0 WHEN NO CHARGE WILL BE MADE

### 3.1 Education

There will be no charge for:

- Admission or applications for admission
- Education provided wholly or mostly 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, if the tuition is required as part of the National Curriculum, a syllabus for a prescribed public examination that the pupil is being prepared for at the school or religious education. This includes the first access to the Key Stage 2 Instrumental and Vocal Tuition Programme (Wider Opportunities).
- Entry for a prescribed public examination if the pupil has been prepared for it at the school.

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- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school. Where this is not the case, a charge will be made to cover the associated costs.

### 3.2 Transport

There will be no charge for:

- 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 governing body/trust board or local authority has arranged for pupils to be educated
- 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

### 3.3 Educational Visits

There will be no charge for:

- 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 staff to cover for those staff who are absent from school accompanying pupils on a residential visit.

## 4.0 VOLUNTARY CONTRIBUTIONS

4.1 When charges do not apply, parents and carers may be asked for a voluntary contribution towards the cost of some of the educational opportunities that we offer such as:

- On site enrichment activities, educational visits and the associated transportation and other costs
- Specialist equipment
- General school funds to improve opportunities.

4.2 From time to time, we may invite outside organisations to deliver an activity during the school day. Such organisations may wish to charge parents, who are entitled not to pay any fee and instead to ask the headteacher to agree to their child being absent/taught elsewhere in school for that period. In many cases, however, parents and carers will not be charged and will be asked for a voluntary contribution towards the cost of the activity instead.

4.3 All requests to parents and carers for voluntary contributions will make it clear that the contributions are voluntary and that there is no obligation to pay. Pupils whose parents or carers do not contribute will not be treated differently or excluded.

4.4 However, the Trust Board reserves the right, to cancel activities if not enough voluntary contributions are received.

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**5.0 WHEN CHARGES WILL BE MADE**

5.1 The Trust may recover the full costs of some items and activities, but charges will not exceed the actual cost for:

- Ingredients, materials, books, instruments or equipment, where a pupil’s parents or carers have indicated in advance that they would like their child to own the items or finished products. No pupil will be disadvantaged if they do not or cannot take up the opportunity to own items or finished products.
- Non-attendance “without good reason” of any public examination that incurs a fee
- Non-returned library books, text books or other loaned equipment
- Optional extras
- Music and vocal tuition, in limited circumstances
- School meals
- School milk scheme
- Before and/or after school care
- Certain early years provision
- Boarding costs
- Community facilities (dealt with separately from this policy in hire agreements).

**5.2 Optional Extras**

5.2.1 There are charges for:

- Education that takes place outside school hours if it is not part of:
  - The National Curriculum
    - A syllabus for a prescribed public examination that the pupil is being prepared for at this school
    - Religious education
- Examination entry fee(s), including for re-sits if the pupil has not been prepared for the examination(s) or re-sit at the school.
- Transport (other than transport that is required to take pupils to school or to other premises where the local authority/ trust board have arranged for pupils to be provided with education).
- Board and lodging for a pupil on a residential visit (unless remission is granted)
- Extended day services offered to pupils (for example breakfast club, lunchtime and after-school clubs, tea and supervised homework sessions where this is run under the responsibility of the trust board).

5.2.2 In calculating the cost of optional extras an amount may be included for:

- 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, this includes 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.

5.2.3 Any charge made in respect of individual pupils will not exceed the actual cost of providing the optional extra activity, divided equally by the number of pupils participating. Families on a low income who are unable to pay such charges should speak to the school about remission in complete confidence.

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5.2.4 A request can be made for a formal review of centre assessed marking. Where this is the case a charge will be made to cover the costs at the same rate as the exam board receipt remark charge for that particular course component (Policy ref. KS/CUR/50).

5.2.5 Requests for reviews of marking must be made in writing within 3 working days of receiving copies of the materials by completing the internal assessment appeals form. A charge will be made to cover the associated costs. This will be chargeable at the same rate as script remark for that particular course component.

**5.3 Music Tuition**

5.3.1 No charge will be made for musical instrument tuition if the tuition is required as part of the curriculum or part of a syllabus for a public examination that the pupil is being prepared for at the school.

5.3.2 A charge will be made for vocal and musical instrument tuition for either an individual pupil or groups of pupils, where it does not fall under paragraph 9.1.

5.3.2 National charging guidance will be followed, and no charge will be made in respect of a pupil who is looked after by a local authority (within the meaning of section 22(l) of the Children Act 1989).

**5.4 School Meals**

5.4.1 School meals are available to pupils at a cost or free of charge to the pupils of families entitled to free school meals. Families can find out how to [Apply for free school meals - GOV.UK \(www.gov.uk\)](http://www.gov.uk) or they can apply directly to their home Local Authority at [Citizen Portal - Sign in \(cumberland.gov.uk\)](http://cumberland.gov.uk). Families needing help to do this can ask at the school office.

5.4.2 To enable our school meals service to be planned efficiently, we sometimes need advance notice of a pupil’s requirements and ask for notice to start or stop receiving a school meal.

5.4.3 Payment for school meals is required in advance.

5.4.4 If a pupil’s entitlement to free school meals has expired, a parent or carer must provide a packed lunch or make advanced payment for any school meals to be taken.

5.4.5 If a pupil arrives at school without payment or a packed lunch, we will use their emergency contact information to find out if suitable arrangements have been made. School is not obliged to provide a meal without payment and when there is no entitlement to a free school meal so, we will act promptly to address financial issues at an early stage when we can, to prevent arrears accumulating.

5.4.6 If no arrangements are in place, we will ask parents or carers to bring to school a suitable packed lunch or the cost of a school meal before lunchtime. In special circumstances we might accept payment on the next school day.

5.4.7 Where our efforts to resolve payment problems within the same school week fail, or where a persistent debt has arisen the school will follow its debt collection procedures.

5.4.8 We are committed to working together to find suitable payment plans for parents and carers in financial difficulties, and anyone experiencing this should speak to the Head teacher in the strictest confidence. We may be able to signpost families to extra government or community support in the immediate or short term.

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**5.5 School Milk Scheme**

5.5.1 Under [The Requirements for School Food Regulations 2014 \(legislation.gov.uk\)](https://www.legislation.gov.uk) all schools must make lower fat milk or lactose reduced milk available to drink at least **once** a day during school hours or the lunch break at a fair cost or free of charge to all pupils who are entitled.

5.5.2 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.

5.5.3 When a child has their 5<sup>th</sup> birthday, a small charge will be made towards the cost of continuing to provide this single portion of milk to those parents and carers who want their children to continue receiving it.

5.5.4 Children who have reached the age of 5 and have not yet reached the age of 19 can continue to receive up to one third of a pint of milk free of charge if their family has been able to successfully [apply for free school meals - GOV.UK \(www.gov.uk\)](https://www.gov.uk).

5.5.5 In the case of infant pupils who are entitled to a universal infant free school meal, milk must be offered free to those pupils **if** it forms part of the school lunch. If milk is offered at any other time during the school day instead, it will only be free for those infants who have an underlying income-related entitlement to free school meals.

5.5.6 A parent or carer who wishes their child to receive more than one portion of milk per day must pay the full cost of each additional portion, even when their first portion is free due to an entitlement.

5.5.7 For more information about our milk scheme and the current charges, please contact the school office.

**5.6 Before and/or After School Care**

5.6.1 Charges will be made for childcare services offered to pupils before school, after school and during school holidays when they are run by the Trust.

5.6.2 The fees and any remissions are set and reviewed by the Governing Body/Trust Board no less than annually. For information about current childcare charges please contact the school.

**5.7 Certain Early Years Provision**

5.7.1 Government funding covering the cost of delivering 15 or 30 hours a week of free, high quality, flexible childcare for children aged 3-4 years and for some 2-year-olds does not include the cost of meals, snacks, consumables such as nappies or sunscreen, additional hours or additional services such as trips or outings for which there will be charges.

5.7.2 Families are encouraged to supply their children with a healthy snack and drink from home and, if they stay for the lunchtime period between the morning and afternoon nursery sessions, a healthy lunch or make arrangements to pay for the healthy snacks and meals school can provide.

5.7.3 Additional hours and services will be charged at the current hourly rate where hours are not fully funded as Early Education by the local authority. This includes the lunchtime period between sessions.

5.7.4 For our current session times and rates please contact the school office. Charges for additional services such as trips will be agreed in advance with families.

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5.7.5 The free entitlements will be delivered consistently so that all children accessing any of the free entitlements will receive the same quality and access to provision, regardless of whether they opt to pay for additional hours and/or services.

5.7.6 We will not charge a deposit to secure a child’s free place and there is no requirement to pay a registration fee as a condition of taking up a child’s free place. We will also not charge ‘top up fees’ to recoup the difference between the amount received from the Local Authority and the current hourly rate.

**5.8 Damage to School Property and Breakages**

5.8.1 The school will attempt to recover some, or all the costs incurred repairing wilful or culpably negligent damage or breakage of school property or property belonging to a third party where the school has been charged. The actual amount will be determined by the headteacher.

**5.9 Boarding Charges**

5.9.1 There are charges for:

- the cost to school of providing overnight board and lodging, and
- optional extended day services offered to day pupils, for example breakfast clubs, afterschool clubs, tea and supervised homework sessions.

**6.0 CALCULATING CHARGES AND REMISSION**

6.1 The principles of best value will be applied when planning activities that incur costs to school and/or charges to parents and carers.

6.2 When charges are made for activities, they will be based on the actual costs incurred, divided by the total number of pupils participating. There will be no levy on those who can pay to support those who can’t. Support for cases of hardship will come through applicable funding such as pupil premium money, specified voluntary contributions and fundraising.

6.3 In some circumstances, school may not charge for items or activities set out in section 5 of this policy. This waiving of charges is called remission. It will be at the discretion of the Governing Body/Trust Board and will depend on the reasons for the charges and the circumstances of the recipients.

6.4 Pupils who are looked after by a local authority or whose parents or carers are receiving specified benefits are entitled to full remission of some charges outlined in Section 5. This entitlement is subject to change but usually equates to pupils being eligible for free school meals (except when they are an infant only eligible under the universal infant free school meal scheme). To find out which benefits are specified and eligible for full remission, see information on how to [Apply for free school meals - GOV.UK \(www.gov.uk\)](http://www.gov.uk).

6.5 Charges for other 'chargeable activities' may also be fully or partly remitted. Where appropriate governors/trustees can approve the use of the delegated budget and other funding streams such as Pupil Premium to allow 'chargeable activities' to be fully or partly remitted.

6.6 Details of any remission arrangements will be made clear when parents and carers are informed of charges for individual activities.

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6.1.7 If during a trip, visit or activity an alternative activity is undertaken, for example due to adverse weather, or an additional discount is given at point of entry, a refund will be applied following the trip in accordance with the Trips and Visits Policy (KS/CUR/076).

**7.0 NON-RESIDENTIAL ACTIVITIES**

- 7.1 Where the majority of time (more than 50%) spent on a non-residential activity is *within* normal school hours, the charging regime will be as if it happens *fully within* school hours.
- 7.2 Where the majority of time (more than 50%) spent on a non-residential activity is *outside* normal school hours, the charging regime will be as if it happens *fully outside* school hours i.e. the activity becomes an ‘optional extra’ unless it is part of the school’s curriculum or is required for a public examination that the pupil is being prepared for at this school or part of religious education.
- 7.3 Travel time is included when considering the time spent on an activity only when it occurs during school time.

**8.0 RESIDENTIAL ACTIVITIES**

- 8.1 Parents and carers will be charged board and lodging for a pupil to attend a residential visit unless remission is granted.
- 8.2 To cover any other costs associated with a residential visit e.g. transport, activity tuition, for which charges cannot be made, they will be asked to make a voluntary contribution. No child will be denied the opportunity of attending a residential (if it is not an Optional Extra) if their parents or carers do not contribute voluntarily.
- 8.3 If not enough voluntary contributions are received to cover the costs of a residential, governors/trustees reserve the right to cancel the activity.
- 8.4 Charges will be made to cover all residential visit costs only where the visit is deemed to be an ‘optional extra’ because the number of half-day school sessions missed by the pupils taking part totals less than half of the number of half-days taken up by the activity (see definitions). In such cases, parents and carers will be told how the charges were calculated.

**Example 1**

Pupils are away from noon on Wednesday to 9pm on Sunday. This counts as 9 half days including 5 school sessions, so the visit is deemed to have taken place during school hours.

**Example 2**

Pupils are away from school from noon on Thursday until 9pm on Sunday. This counts as 7 half days including 3 school sessions, so the visit is deemed to have taken place outside school hours.

**9.0 DEBT RECOVERY**

9.1 It is Trust policy that all services provided by the Trust are paid for in advance and therefore it is expected that no debts will be accrued. In the unlikely event that debts are accrued, the MAT Directors authorise the Trust to take all reasonable measures to collect debts as part of its management of public funds. In doing so, the Trust will observe the relevant financial regulations and any other legal requirements.

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- 9.2 A debt will only be written off after all reasonable measures (commensurate with the size and nature of the debt) have been taken to recover it. Only debts below that allowed for in the Academy Trust Handbook may be written off. The recovery of any sums above this amount will be referred first to the MAT Directors and then to the Education and Skills Funding Agency for approval. If any debtor has a number of debts that together exceed the write-off limit then these will collectively be treated as the total amount.
  
- 9.3 Unless a decision to write-off a debt is demonstrably a reasonable course of action, authorisation is in place to initiate legal or other action to recover debts.
  
- 9.4 A formal record of any debts written off will be maintained and this will be retained in accordance with the Records Management Policy (KSMAT/STAT/020).

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