



# Charging and Remissions Policy

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## **Statement of intent**

Lostock Hall Academy is committed to ensuring equal opportunities for all students, 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.

The academy will:

- Never charge for education provided during academy hours.
- Inform parents on low incomes and in receipt of relevant benefits of the support available to them when asking for contributions towards the costs of academy visits.

## 1. Legal framework

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

- Education Act 1996
- The Charges for Music Tuition (England) Regulations 2007
- The Education (Prescribed Public Examinations) (England) Regulations 2010
- DfE (2018) 'Charging for academy activities'
- DfE (2020) 'Governance handbook'
- The trust's Funding Agreement
- ESFA 'Academy trust handbook' (ATH)

## 2. Charging for education

The academy will not charge for:

- Admission applications.
- Education provided during academy hours.
- Education provided outside academy hours if it is part of the national curriculum, part of a syllabus for a prescribed public examination that the student is being prepared for by the academy, or part of RE.
- Instrumental or vocal tuition, for students learning individually or in groups, unless 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 academy.
- Examination resits, if the student is being prepared for the resits at the academy.

The academy may charge parents/carers for:

- Materials, books, instruments or equipment, where they desire their child to own them.
- Optional extras.
- Music tuition (in certain circumstances).
- The use of community facilities and other commercial activities.

## 3. Optional extras

The academy may charge parents/carers for the following optional extras:

- 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 student is being prepared for at the academy
  - Religious Education
- Examination entry fees where the student has not been prepared for the examinations at the academy
- Transport, other than that for the student to be provided with education agreed by the Trustees.
- Board and lodging for a student on a residential visit

- Extended day services offered to students.

When calculating the cost of optional extras, the academy will only take into account the following:

- Materials, books, instruments or equipment provided in relation to the optional extra
- Buildings and accommodation
- Non-teaching staff, including TAs
- Teaching staff 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.

The Academy will not charge in excess of the actual cost of providing the optional extra divided by the number of participating students. A subsidy will not be charged for any students wishing to participate but whose parents are unwilling or unable to pay the full charge. In cases where a small proportion of the activity takes place during school hours, the academy will not charge for the cost of alternative provision for those not participating.

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 prerequisite for the provision of an optional extra where charges will be made.

#### **4. Examination fees and resits**

The academy may charge for examination fees if:

- The examination is on the set list (which includes SATs, GCSEs and A-levels), but the student was not prepared for it at the academy.
- The examination is not on the set list, but the academy arranged for the student to take it.
- A student fails, without good reason, to complete the requirements of any public examination where the Trust Board or LA originally paid or agreed to pay the entry fee.

Where a student is entered for a second or subsequent attempt at an examination, the academy will pay the fee. Once students have left the academy, resits must be taken at the destination education establishment.

If a student or their parent consider it to be in the best interests of the student to request that an examination is re-marked, any fees involved will be covered by the student or their parent. If the awarding body changes the overall grade of the result, the academy will not be charged by the awarding body and the parent or student will have their fees refunded.

#### **5. Voluntary contributions**

The academy may, from time-to-time, ask for voluntary contributions towards the benefit of the academy or academy activities. If an activity cannot be funded without voluntary contributions, the academy will make this clear to parents at the outset. The academy will make it clear to parents that there will be no obligation for parents to make any contribution. Parents will be notified regarding whether assistance is available.

No student 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 and the academy will set out how places will be allocated from the outset. If insufficient voluntary contributions are raised to fund an activity, and the academy cannot fund it via another source, the activity will be cancelled and this will be made clear to parents.

The academy will strive to ensure that parents do not feel pressurised into making voluntary contributions.

## **6. Music tuition**

Instrumental and vocal 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 student's parents/carers.

The charges will not exceed the cost of the provision, including the cost of the staff providing the tuition.

## **7. Transport**

The academy will not charge for:

- Transporting registered students to or from the academy premises, where the LA has a statutory obligation to provide the transport.
- Transporting students to meet an examination requirement when they have been prepared for the examination at the academy.
- Transport provided for an educational visit.

The academy may charge for:

- Transporting registered students to other premises where the Trust Board has arranged for students to be educated.

## **8. Educational Visits**

Where participation in a visit undertaken during Academy time it is essential to enable a student to complete a GCSE course (e.g. a field work visit to enable course work to be completed) no charge will be made. The cost will be met from the Academy's Funds.

The vast majority of visits do not fall into the above category. They are undertaken to enhance courses and provide students with experience they cannot gain in the Academy. The Trust are sure parents will wish these visits to continue. It will only be possible for them to do so, however, if they continue to be self-financing. Participation in these visits is voluntary. Letters inviting students to participate in such visits will also invite parents to make a voluntary contribution to the Academy Fund equal to the cost of the visit. The visit will then be paid for by the Academy Fund. If it is not possible to cover the cost of the visit by these voluntary contributions, it may be necessary to cancel it.

Special rules apply in connection with Residential Visits. If a residential visit is deemed to fall within Academy time or is deemed essential and meets the requirements of the syllabus for a public examination or is to do with the National Curriculum or religious education, then no charge will apply for the costs of education or travel. However, charges will apply for board and lodgings. The charge will not exceed the actual overall cost of the visit. Exceptions to this can be applied in respect of students whose parents are in receipt of certain benefits. Guidance should be sought from the Academy.

## **9. Damaged or lost items**

The Academy may charge for the cost of replacing items that are broken, damaged or lost due to the negligence or poor behaviour of their child. Parents/carers will not be taken to court for failure to pay such costs. The academy will consider waiving costs in exceptional circumstances, e.g. financial hardship.

## **10. Remissions**

The academy will set aside a fund to enable families in financial difficulty to send their students on visits and activities. The funding will be limited and there is no guarantee that all requests can be met. Assistance will be allocated on a needs basis, and if the full cost of the trip or activity cannot be met through assistance funding and voluntary contributions, the trip or activity will be cancelled.

Parents/carers in receipt of any of the following benefits may request assistance with the costs of activities:

- 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 State Pension Credit
- Child Tax Credit, provided that they are not also entitled to Working Tax Credit and they have an annual gross income of no more than £16,190
- Working Tax Credit run on – paid for four weeks after they stop qualifying for Working Tax Credit.
- Universal Credit – if they apply on or after 1 April 2018, their household income must be less than £7,400 a year (after tax and not including any benefits they receive)

To request assistance, parents should contact the Director of Business and Finance via the website <https://lostockhallacademy.org/>

## **11. Academy trip refunds**

All initial deposits for academy trips will be non-refundable. Parents/carers will be informed of this when they are provided with initial information about the trip.

In the event that the academy has to cancel a trip due to foreseen circumstances, parental contributions will be refunded. In the event that an academy trip is cancelled by a party other than the academy due to unforeseen circumstances, it is at the academy's discretion as to whether a refund is given.

In the event that a student or parents/carers cancel the student's place on a trip, it will be at the academy's discretion as to whether a refund is given. The academy will take into account the reason for cancellation, whether the academy will be reimbursed for the student's place on the trip, and whether the place on the trip can be offered to another student.

Where a student or their parents/carers have previously cancelled a place on a trip and received a full refund, the academy will have the right to refuse to allow the student to attend future trips and visits.

In the event that a student cannot attend a trip at the last minute, e.g. due to illness, it will be at the academy's discretion as to whether a refund is given. The academy will take into account whether the academy will be reimbursed for the student's place on the trip and whether the place on the trip can be offered to another student.

In the event that an academy trip is postponed due to unforeseen circumstances, it will be at the academy's discretion as to what happens with the parental contributions for the trip. The academy will consider its options, which could include carrying forward the money until the trip takes place, transferring the money to another trip, or refunding parents/carers.

In the event that the decision is made to postpone a trip due to foreseen circumstances, it will be at the academy's discretion as to what happens with the parental contributions for the trip. The academy will consider its options, which could include carrying forward the money until the trip takes place, transferring the money to another trip, or refunding parents/carers.

Once trip arrangements have been booked and confirmed, if contributions exceed the total cost of the trip, a refund will be given where the excess is greater than £1 per student.

The academy will deal with cancellations and refunds on a case-by-case basis, ensuring that all students and their families are treated equally.

If a parent/carer wishes to make a complaint about refunds, they will be able to do so via the Complaints Procedures Policy.

## **12. Income generation**

In line with the ESFA's ATH, the trust will set fees for chargeable services at full cost, and reserves the right to apply an additional rate of return when in a commercial environment.

## **13. Monitoring and review**

This policy will be reviewed regularly by the Trust Board, an individual Trustee or the Principal.