



Charging and Remissions Policy

Author	Written	Next Review
M. Hunter	January 2023	January 2025

Contents:

[Statement of intent](#)

1. [Legal framework](#)
2. [Charging for education](#)
3. [Optional extras](#)
4. [Examination fees and resits](#)
5. [Voluntary contributions](#)
6. [Music tuition](#)
7. [Transport](#)
8. [Education partly during school hours](#)
9. [Residential visits](#)
10. [Damaged or lost items](#)
11. [Remissions](#)
12. [School trip refunds](#)
13. [Income generation](#)
14. [Freedom of Information Policy and Publication Scheme](#)
15. [Monitoring and review](#)
16. [Implementation](#)
17. [Appendix 1](#)
18. [Appendix 2](#)

Statement of intent

Shenstone Lodge School 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 school trips, activities and educational extras.

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

We promise:

- Not to charge for education provided during school hours.
- To 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 school visits.

Please note that while this policy may be more or less generous than the LA's, we have ensured it meets the requirements of the law.

1. Legal framework

This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:

- Education Act 1996
- The Charges for Music Tuition (England) Regulations 2007
- The Education (Prescribed Public Examinations) (England) Regulations 2010
- Freedom of Information Act 2000
- DfE (2018) 'Charging for school activities'
- DfE (2020) 'Governance handbook'
- The trust's Funding Agreement
- ESFA (2021) 'Academy trust handbook 2021'

This policy operates in conjunction with the following school policies/documents:

- Complaints Procedures Policy
- Debt Recovery Policy
- Freedom of Information Policy and Publication Scheme
- Scheme of Delegation
- Finance Policy

2. Charging for education

The school will not charge for:

- 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, part of a syllabus for a prescribed public examination that the pupil is being prepared for by the school, or part of RE
- Instrumental or vocal tuition, for pupils learning individually or in groups, unless provided at the request of the pupil's parent.
- Tuition for students learning to play musical instruments if the tuition is required as 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
- Entry for a prescribed public examination, if the pupil has been prepared for it at the school.
- Examination resits, if the pupil is being prepared for the resits at the school.
- Education that is provided on any trip that takes place during school hours.
- Transporting registered students to or from the school premises, where the local education authority has a statutory obligation to provide transport
- Transporting registered students to other premises where the Local Advisory Board or Local Authority has arranged for students to be educated.
- Transport provided in connection with an educational trip.
- Transport that enables a pupil to meet an examination requirement when he/she has been prepared for that examination at the school.

The school may charge for:

- Materials, books, instruments or equipment, where the child's parent wishes their child to own them.
- Board and lodging on residential visits (not to exceed the costs)
- The proportionate costs for an individual student of activities wholly or mainly outside school hours ('optional extras') to meet the costs for:
 - travel associated costs
 - materials and equipment
 - non-teaching staff costs
 - entrance fees/activity fees
 - insurance costs
- Music tuition (in certain circumstances).
- Certain early years provision.
- Re-sits for public examinations where no further preparation has been provided by the school
- Costs of non-prescribed examinations where no further preparation has been provided to the school.
- Any other education, transport or examination fee, unless charges are specifically prohibited.
- Breakages, replacements, repairs as a result of damage caused wilfully or neglectfully by students.
- Use of community facilities and other commercial activities, i.e., Pupils are allowed to contact Parents/ Carers/ Relatives at convenient times, free of charge with permission of a staff member. There is a pupil designated telephone for calls of a confidential nature on the Shenstone Lodge site. Students at the Brades Lodge site will have access to a phone as required.
- Meals- Staff who are not timetabled for duty cover are able to pre-order meals and pay the school at a rate determined by the meal provider, (see ap. 1). Staff who are available as on call support are not entitled to a free meal.
- Photocopies- private photocopies are limited to a maximum of 50 A4 or equivalent per day and are charged at the rate prevailing (see app 1).
- Public documents provided under the General Data Protection Regulations are no longer charged for.
- Provision of information within the scope of freedom of information.

Note: Any chargeable items or services are provided solely at the discretion of the school and may be subject to availability. The school reserves the right to vary charges without notice.

3. Optional extras

The school may charge 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
 - Part of RE

- Examination entry fees where the pupil has not been prepared for the examinations at the school
- Transport, other than that required to take the pupil to school or to other premises where the LA has arranged for the pupil to be provided with education
- Transport, other than that required to take the pupil to school or to other premises where the trust board has arranged for the pupil to be provided with education
- Board and lodging for a pupil on a residential visit
- Extended day services offered to pupils, e.g. breakfast or out-of-school provision

When calculating the cost of optional extras, an amount may be included in relation to 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, where the tuition is an optional extra

The school will not charge in excess of the actual cost of providing the optional extra divided by the number of participating pupils. A subsidy will not be charged for any pupils 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 school will not charge for the cost of alternative provision for those not participating.

The school will not charge for supply teachers to cover for teachers who are absent from school accompanying pupils on a residential visit.

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.

If a charge is to be made for a particular activity, such as optional extras, parents will be informed of how the charge will be calculated.

4. Examination fees and resits

The school may charge for examination fees if:

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

Where a pupil is entered for a second or subsequent attempt at an examination, the school will pay the fee. Once pupils have left the school, resits must be taken at the school.

If a pupil or their parent 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 parent. If the awarding body changes the overall grade of the result, the school will not be charged by the awarding body and the parent or pupil will have their fees refunded.

5. Voluntary contributions

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

No pupil 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 school cannot fund it via another source, the activity will be cancelled.

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

- The contribution is genuinely voluntary and a parent/carer is under no obligation to pay
- No student will be treated differently according to whether or not a voluntary contribution is made
- Should insufficient voluntary contributions be received for any trip/activity/event to be deemed not financially viable, the school reserves the right to cancel the trip/activity/event.

The responsibility for determining the level of voluntary contribution to be requested delegated to the Lead Organiser of each activity in consultation with the Head of School. Voluntary contributions will be used to:

- Enhance and support learning
- Support with some educational visits,
- Assist with travel costs

6. Music tuition

Instrumental and vocal music tuition is an 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. The charges will not exceed the cost of the provision, including the cost of the staff providing the tuition.

Charging will not be made if the teaching is an essential part of the national curriculum.

Charging will also not be made if the teaching is provided under the first access to the KS2 Instrumental and Vocal Tuition Programme.

No charge will be made in respect of pupils who are LAC.

7. Transport

The school will not charge for:

- Transporting registered pupils to or from the school premises, where the LA has a statutory obligation to provide the transport.
- Transporting registered pupils to other premises where the governing board 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 school.
- Transport provided for an educational visit.

8. Education partly during school hours

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

Whatever the start and finish times of the school day, regulations require that the school day is divided into two sessions. School hours do not include the break in the middle of the day.

If less than 50 percent of the time spent on an activity occurs during school hours, it is deemed to have taken place outside school hours and the school may charge for the activity; however, the 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 school, or part of RE.

The remission of charges for board and lodging payments is the responsibility of the school. These costs will be borne by the school.

Any charges for extended day services will be optional.

The school may charge for:

- Overnight board and lodging, but the charge will not exceed the actual cost.
- Extended day services for day pupils.

9. Residential visits

The 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 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 RE.
- Supply teachers to cover for teachers accompanying pupils on visits.

The school may charge for board and lodging, but the charge will not exceed the actual cost. Parents will be exempt from board and lodging costs if they can prove that they are in receipt of one or more of the following benefits:

- 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 they are not also entitled to Working Tax Credit and 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)

If the number of school sessions covered by the visit is equal to or greater than 50 percent of the number of half days (any period of 12 hours ending with noon or midnight on any day) spent on the visit, the school will not charge for the activity.

10.Damaged or lost items

The school may charge for the cost of replacing items that are damaged or lost due to the negligence or poor behaviour of pupils or their parents.

11.Remissions

Shenstone Lodge School- The Brades Lodge has set aside a fund to enable parents in financial difficulty to send their children on visits and activities. The funding is 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.

Students whose parents are in receipt of the government report payments may, in addition to having a free school lunch entitlement, also be entitled to the remission charges for board and lodging costs during residential school trips. Parents in receipt of any of the following benefits may request assistance:

- 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 do not exceed the current HMRC levels
- 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 the current HMRC rates per year (after tax and not including any benefits they receive)

Parents/Carers who believe that they may qualify for this remission must apply in the writing to the Executive Head Teacher or Head of School. Complete confidence will be observed in all matters.

Car allowance – Mileage allowance for authorised journeys only will be refunded at the rate indicated in the LA guidelines in force at the time of travel (see app 1). Claims should be submitted within 3 months of the mileage covered. School will not pay mileage beyond this date unless there are exceptional circumstances as determined by the Executive Head teacher/School Bursar. In any instance, all claims need to be submitted by the end of the financial year that they relate to. Any claims received after that date will not be authorised.

Telephone- Staff and Governors of the school whose duties require evening or overnight attendance will be entitled to a phone call of reasonable length to their immediate family. Emergency phone calls are at the discretion of the senior staff present.

Meals – Staff who are not timetabled for duty cover are able to pre-order meals and pay the school at a rate determined by the meal provider (see app 1). Governors carrying out their normal duties, and invited guests of the school will be entitled to meals free of charge. Staff who are available as on call support are not entitled to a free meal.

12.School trip refunds

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

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

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

Where a pupil or their parents have previously cancelled a place on a trip and received a full refund, the school has the right to refuse to allow the pupil to attend future trips and visits.

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

In the event that a school trip is postponed due to unforeseen circumstances, it is at the school's discretion as to what happens with the parental contributions for the trip. The school 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.

In the event that the decision is made to postpone a trip due to foreseen circumstances, it is at the school's discretion as to what happens with the parental contributions for the trip. The school 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.

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 pupil.

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

If a parent wishes to make a complaint about refunds, they can do so via the Complaints Procedures Policy.

13. Income generation

In line with the ESFA's '[Academy trust handbook](#)', 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.

14. Freedom of Information Policy and Publication Scheme

The school's Freedom of Information Policy and Publication Scheme sets out where fees may be charged for the provision of information.

15. Monitoring and review

This policy will be reviewed biannually by the Local Advisory Board.

16. Implementation

Charges will normally be levelled at the point of delivery of the items or services concerned. If appropriate an invoice will be raised by the Bursar, detailing the items or services supplied, and appropriate charge/s levied. Receipts will be issued if requested. Any monies received will be logged and handled appropriately as per normal financial procedures.

Remissions will be refunded within a reasonable time period either via petty cash or cheque on provision of a receipt signed by the Line Manager, or an appropriate claim form signed by the Line Manager together with all relevant receipts. The claim form should indicate the nature of the claim and the value claimed.

Receipts and/or claim forms should be submitted to the Admin Team and will be honoured only if signed by the Line Manager and are submitted within the three working months of the expenditure.

It should be ensured that appropriate authorisation for any intended expenditure is obtained before the expenditure occurs. The school reserves the right to refund any unauthorised expenditure.

Charges and remission values will be as set by the LA or by the Local Advisory Board, as appropriate, and will be available for inspection from the School Bursar.

17. Appendix 1

School meal charge 2022/23 £2.40

Photocopy 10p a sheet

Car Mileage allowance 2022-23 – 45p per mile (for the first 10000 miles and 25p per mile thereafter). Exceptional circumstances are determined by the Executive Head Teacher/School Bursar. In any instance, all claims must be submitted by the end of the financial year in which they relate. Any claims received after that day will not be authorised.

18. Appendix 2

The data protection Act (section 7) allows for a flat fee of £10 to be charged for the supply of structured personal information.

Under section 12 of the Freedom of Information Act, a public authority is not obliged to comply with a request for information in the authority estimates that the cost of complying with the request would exceed the “appropriate limit” prescribed in the regulations. The freedom of Information and Data Protection (Appropriate limit and Fees) Regulations 2004, identify the appropriate limit of fees and charges a school is permitted to levy, as detailed below.

The “appropriate limit” is set at £450 for LA and therefore schools. This is calculated on a standard rate of £25 per hour based on estimating the staff time taken to:

- Determine the information held
- Locate the information or a document which may contain the information
- Retrieve the information, or a document, which may contain the information
- Edit or extract the releasable information contained within a document.