



**Shaw  
Education  
Trust**

# Charges and Remissions Policy

Procedure Originator: Helen Turner

Approved By: C-Suite

Queries to: H. Turner

Review Interval: 3 years

## **1. Introduction**

The Shaw Education Trust wishes to provide all students the best possible educational opportunities available within the funds allocated by the Education and Skills Funding Authority (ESFA).

Section 449-462 of the Education Act 1996 sets out the law on charging for school activities and Academies are required through their funding agreements to comply with the law on charging for school activities. The law states that education during normal academy hours is free of any compulsory charge to parents/carers, and the Trust is committed to upholding the legal requirements. However, educationally valuable activities have been and will continue to be dependent on financial contributions in whole or in part from parents/carers.

The Trust's concern is to keep financial contributions to a reasonable minimum, and to ensure as far as possible that all children are able to take part, irrespective of their circumstances.

The law recognises that charges may be made to parents/carers in certain defined circumstances - provided that the Trust's academies have identified the activities for which charges will be made and have explained the basis on which charges may be reduced or waived for certain students. The agreed policy follows.

## **2. Responsibilities**

It is the Principal's responsibility to ensure that staff are familiar with and correctly apply the policy. The Trustees will review the policy annually. Any determination with respect to individual parents / carers will be delegated to and considered by the Principal or Academy Council.

### Legal Prohibition of Charges

The Shaw Education Trustees recognise that legislation prohibits charging for the following:

#### Education and Exams

- Education provided during academy hours (including the supply of any materials, books, instruments or other equipment);
- Education provided outside academy hours if it is part of the national

curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the academy, or part of religious education;

- Instrumental or vocal tuition, for pupils learning individually or in groups, unless the tuition is being provided at the request of the pupil's parent;
- Entry for a prescribed pupil examination, if the pupil has been prepared for it at the academy; and
- Examination re-sit[s] if the pupil is being prepared for the re-sit[s] at the academy.

#### Transport

- transporting registered pupils to or from the school premises, where the local education authority has a statutory obligation to provide transport;
- transporting registered pupils to other premises where the governing body or local authority has arranged for pupils to be educated;
- transport that enables a pupil to meet an examination requirement when he has been prepared for that examination at the school; and
- transport provided in connection with an educational visit

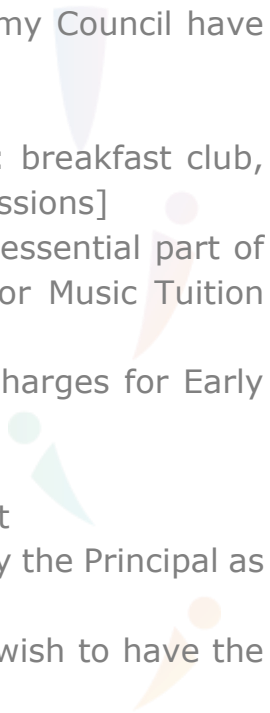
#### Residential Visits

- 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, or part of a syllabus for a prescribed public examination that the pupil 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 pupils on a residential visit.

### **3. Charges**

The Shaw Education Trustees in each of the following cases intend to make a charge for:

- Any materials, books, instruments, or equipment, where the child's parents/carers wish him/her to own them;
- Education provided outside of academy time that is not part of the national curriculum, part of a syllabus for a prescribed public examination or part of religious education;
- Examination entry fee[s] if the registered pupil has not been prepared for the examination at the academy;
- Transport [other than transport that is required to take the pupil to the

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- academy or to other premises where the Trust/Academy Council have 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 [for example: breakfast club, after-academy clubs, tea and supervised homework sessions]
  - Music and vocal tuition [where the teaching is not an essential part of either the National Curriculum as per The Charges for Music Tuition (England) Regulations 2007]
  - Certain Early Years Provisions under the Education (Charges for Early Years Provision) Regulations 2012
  - Community facilities under s.27(1) of the Education Act
  - Breakages & proportionate replacement costs agreed by the Principal as a result of damages caused wilfully by pupils.
  - Charges for materials or ingredients where the pupils wish to have the finished product.

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

- Any materials, books, instruments, or equipment provided in connection with the optional extra;
- The cost of buildings and accommodation;
- Non-teaching staff;
- Teaching staff [including Supply Teachers] engaged under contracts for services purely to provide an optional extra;
- The cost or an appropriate proportion of costs, for the teaching staff employed to provide tuition in playing a musical instrument, or vocal tuition, where the tuition is an optional extra.

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. It must not therefore include an element of subsidy for any pupils wishing to participate in the activity whose parents are unwilling or unable to pay the full charge.

Furthermore, in cases where a small proportion of the activity takes place during academy hours the charge cannot include the cost of alternative provision for those pupils who do not wish to participate. Therefore, no charge can be made for supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential visit.

Participation in any optional extra will be based on parental choice and a willingness to meet the charges. Parental agreement is therefore a necessary pre-requisite for the provision of an optional extra where charges will be made.

#### **4. Voluntary Contributions**

The terms of any request made to parents/carers will specify that the request for a voluntary contribution in no way represents a charge. In addition the following will be made clear:

- The contribution is genuinely voluntary & the parent/carer is under no obligation,
- Registered pupils at the academy will not be treated differently according to whether a contribution has been made.

However if the activity cannot be funded without voluntary contributions, the Academy Council or Principal should make this clear to parents/carers at the outset.

#### **5. Remissions (Non-Charging)**

Where an organisation/individual enters into a custom of friendly support that is mutually beneficial to both organisations e.g. sharing use of facilities, minibus, resources, such conditions should be overseen by the Principal. It would be an expectation that Academies within The Shaw Education Trust are “family organisations” and as such fees should be remitted.

When it is known that an organisation is unable to afford set rates an agreed charge above the actual incurred cost to the academy can be overseen by Principal. On occasions, the academy may choose to organise a specific trip which falls outside the remit of this policy. Under these circumstances, the academy will increase its level of financial contribution. This may occur following specific fundraising or donations.

Also, there is no limit to the level of voluntary contributions which parents can make nor is there any restriction placed upon the use which can be made of such contributions.

As a statutory minimum, a complete remission of board and lodging charges has to be made to pupils who receive directly or whose parents receive:

- Income Support;
- Income-based Job Seekers Allowance;
- Income-related Employment and Support Allowance;
- Support under part V1 of the Immigration and Asylum Act 1999;
- The guaranteed element of Pension Credit
- Child Tax Credit (providing 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 4 weeks after they stop qualifying for Working Tax Credit;
- Universal credit – if they apply on or after 1st April 2018 their household income must be less than £7,400 a year (after tax and not including any benefits they get)

We will inform parents/carers on low incomes and in receipt of the benefits listed of the support available to them when being asked for contributions towards the costs of academy visits. Because of the sensitivity of such cases, staff will consult with the Principal before finalising financial details. Parents are requested to contact the Principal privately to discuss their particular situation.

This policy has been equality impact assessed and we believe in line with the Equality Act 2010. It does not have an adverse effect on race, gender or disability equality.



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