

**THE EDUCATION VILLAGE ACADEMY  
TRUST**



**CHARGING AND REMISSIONS POLICY**

## EVAT Version Control Document

Version:	Date:	Policy Owner:	Amendments made by:	Details of amendments made:	Reviewed by:	Approved by:
V0.1	12.05.16	Richard Gartland	Cathy Knights	Changes to reflect policy standards	ELT	ELT
V1.0	31.10.16	Richard Gartland	Wendy Turpin	Change from Charging to Charging & Remissions Policy to reflect consistent naming convention	Alana Mackenzie	C Knights
V1.1	June 2018	Mike Butler	Wendy Turpin	Changes to reflect new DfE guidance May 18		
V2.0	July 2018	Mike Butler	Wendy Turpin	Final version following ELT	ELT 04.07.18	ELT
V2.1	November 2019	Mike Butler	Wendy Turpin	Review v School Bus Model Policy		
V2.2	December 2019	Mike Butler	Mike Butler	Minor SPaG corrections. Added 'carer' to references to 'parent'	1. ELT 2. Board of Directors	1.ELT 2. Board (via email)
V3.0	January 2020	Mike Butler	Cathy Knights	Final version following Board approval		Board of Directors
V3.1	February 2022	Garry Powers	Garry Powers	See summary sheet	Trustees	
V4.0	March 2022	Garry Powers	Wendy Turpin	Final version following Board approval	FARRC	03.03.22
V4.1	September 2023	Lisa Dunn	Lisa Dunn	No changes	Marie Roe	FARRC 12.10.2023

This policy is reviewed **annually** by the Policy Owner: **Lisa Dunn**.

The next scheduled review date for this policy is **September 2024**.

## Values and Ethos

Our values and ethos are inclusive and child centred. Our Trust is founded on the principles of inclusivity, diversity and fairness, and they are fundamental to our delivery of exceptional learning experiences.

EVAT stands for:

- **E**xcellence and high standards
  - a can-do culture and no-excuses ethos
- **V**alues driven with a deep sense of purpose
  - putting children and young people first
  - behaving ethically
- **A**mbition and aspiration for all
  - irrespective of background or barriers – being truly inclusive
- **T**eamwork
  - we do more, better and faster, together

We are a village. We collaborate, with our learners, their families and our communities, to provide exceptional education so that all the children and young people we serve achieve the best possible outcomes.

## Our Ethos is to:

- Create a nurturing and friendly atmosphere and provide an environment where everyone feels valued for who they are
- Bring out the best in every child and young person and meet the full range of their individual needs
- Provide different and unique experiences, challenges and activities
- Show tolerance and respect for each other
- Prepare our children and young people for lifelong learning
- Improve the life chances of every child and young person we serve.

**This policy, and its associated procedures and protocols, are based on these key principles.**

## Contents

Statement of Intent .....	5
Legal Framework .....	5
Charging for education.....	6
Examination fees .....	7
Examination re-sits .....	8
Voluntary contributions .....	8
Residential trips .....	8
Education partly during school hours.....	9
Music tuition .....	9
Transport .....	10
Damaged or lost items.....	10
Remissions policy .....	10
School trip refunds.....	11
Income generation .....	12
Freedom of Information Policy and Publication Scheme .....	12
Public Sector Equality Duty (Equality Act 2010).....	12

N.B. Where reference is made to an 'Academy' or a 'School' the intention is that the policy is universal and applies to both. Any reference to Principal may also include Executive Principal, Head of School or another member of ELT or SLT.

## Statement of Intent

The Education Village Academy Trust is committed to ensuring equal opportunities for all pupils, regardless of financial circumstances, and has established the following policy and procedures to ensure no child is discriminated against by our offering 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 commit to:

- Not charging for education provided during school hours
- To inform parents and guardians 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.

## Legal Framework

Sections 449-462 of the Education Act 1996 set out the law on charging for school activities, in schools maintained by local education authorities in England. Academies (including Free Schools) are required through their funding agreements to comply with the law on charging for school activities. This policy also has consideration for, and is compliant with, the following legislation and statutory guidance:

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

The policy operates in conjunction with the following policies:

- Complaints Procedures/Policy
- Freedom of Information Policy
- The Scheme of Delegation
- Finance Policy

## Charging for education

Schools and Academies have a statutory duty to provide parents/carers with information regarding what charges can and cannot be made for services provided. The objectives of the charging and remissions provisions set out in the legislation are to:

- Maintain the right to free school education;
- Establish that activities offered wholly or mainly during normal teaching time should be available to all students regardless of their parents' / carers' ability or willingness to help meet the cost;
- Emphasise that there is no statutory requirement to charge for any form of education or related activity, but to provide the Trust with the discretion to charge for optional activities provided wholly or mainly out of school hours;
- Confirm the right to invite voluntary contributions for the benefit of the school, or in support of any activity organised by the school, whether during or outside school hours.

The Trust/school will not charge for:

- Education provided during school hours (including the supply of any materials, books, instruments or other equipment);
- An admission application to any state-funded school – paragraph 1.9 of the School Admissions Code 2012 rules out requests for financial contributions as any part of the admissions process;
- Education provided outside school hours if it is 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;
- Instrumental or vocal tuition, for student's learning individually or in groups, unless the tuition is provided at the request of the pupil's parent/carer;
- Entry for a prescribed public examination, if the student has been prepared for it at the school; and
- Examination re-sit(s) if the student is being prepared for the re-sit(s) at the school.

The Trust/school may charge for:

- Any materials, books, instruments or equipment, where the child's parent/carer wishes him/her to own them;
- Musical and vocal tuition in limited circumstances
- Optional extras as outlined below
- Use of Trust and community facilities
- Certain early years provision (in specific circumstances)
- Provision of information within the scope of freedom of information.

However, there may be occasions where it is necessary to charge for activities, which are deemed to be “**optional extras**” and these are outlined below:

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 religious education
- Examination entry fee(s), if the registered pupil has not been prepared for the examination(s) at the school
- Transport (other than transport that is required to take the pupil to school or to other premises where the Trust 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 students (for example breakfast clubs, after-school clubs, tea and supervised homework sessions).

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

- 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 in playing a musical instrument, where the tuition is an optional extra.

The Trust/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 portion of the activity takes place during school hours, the Trust/school will not charge for the cost of alternative provision for those not participating.

The Trust/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.

## Examination fees

The Trust/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 Trust/school arranged for the pupil to take it;
- A pupil fails, without good reason, to complete the requirements of any public examination where the academy or LA originally paid or agreed to pay the fee.

## Examination re-sits

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

If a pupil or their parents 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 Trust/school must not be charged by the awarding body and the parent/pupil will have their fees refunded.

## Voluntary contributions

From time to time the Trust/school may ask for voluntary contributions towards the benefit of the school or any school activities. If the activity cannot be funded without voluntary contributions, the Trust/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 activity simply because their parents/carers are 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 a trip, and the Trust/school cannot fund it from another source, then it must be cancelled and we will make this clear to parents/carers.

## Residential trips

The Trust/schools **cannot** charge for:

- Education provided on any trip that takes place during school hours;
- Education provided on any trip 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 students on a residential trip.

The Trust/schools **can** charge for:

- Board and lodging, but the charge must not exceed the actual cost.

When we inform parents/carers about a forthcoming trip, we will make it clear that parents/carers who are able to claim certain benefits will be exempt from paying the cost of board and lodging (see Remission Policy below).

If a parent/carer is unwilling or unable to pay, the child must still be given an equal chance to go on the visit. The Trust will make it clear to parents/carers at the outset what the policy for allocating places on school trips will be.

## Education partly during school hours

If 50% 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% of the time spent on an activity occurs during school hours, it is deemed to have taken place outside of school hours and the Trust/school may charge for the activity. However, the Trust/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 Trust/school, or part of RE.

The remission of charges for board and lodging payments is the responsibility of the Trust/school. These costs will be borne by the Trust/school. The charges for extended day services will be optional.

## Music tuition

Although the law states that all education provided during school hours must be free, instrumental and vocal tuition are an exception to this rule.

The Trust/school may charge for instrumental or vocal tuition for either an individual pupil or groups in any size, provided that the teaching is at the parents'/carers' request and the teaching is not an essential part of either the National Curriculum, or part of a public examinations syllabus that the pupil is being prepared for at the school. Any charges will not exceed the cost of the provisions, including the cost of the staff who provide the tuition.

## Transport

The Trust/school **will not** charge for:

- Transporting registered students to or from the school premises, where the local authority has a statutory obligation to provide transport;
- Transporting registered students to other premises where the Board of Directors or local authority has arranged for students to be educated;
- Transport that enables a pupil to meet an examination requirement when the student has been prepared for that examination at the school;
- Transport provided in connection with an educational visit.

The Trust/school **can** charge for:

- Any other transport.

## Damaged or lost items

The Trust/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.

## Remissions policy

If a charge is to be made for a particular type of activity, for example optional extras, we will inform parents/carers how the charge will be worked out and who might qualify for help with the cost (or even get it for free).

The Trust will be sensitive to the needs of any students that are suffering hardship and look to support them in terms of participating in any school organised activity.

Parents 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/carers should contact the Principal.

## 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 Trust/school has to cancel a trip due to unforeseen 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 pupils place on a trip, it is at the Trust/school's discretion as to whether a refund is given. The Trust/school will take into account the reason for the cancellation, whether the Trust/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 Trust/school has the right to refuse to allow the pupil to attend future trips and visits.

In the event that the pupil cannot attend a trip at the last minute e.g. due to illness, it is at the Trust's/school's discretion as to whether a refund is given. The Trust/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 Trust's/school's discretion as to what happens with the parental contributions for the trip. The Trust/school will consider its options, which may 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 Trust's/school's discretion as to what happens with the parental contributions for the trip. The Trust/school will consider its options, which may 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 Trust/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 Policy and Procedure.

## **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.

## **Freedom of Information Policy and Publication Scheme**

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

## **Public Sector Equality Duty (Equality Act 2010)**

In preparing or amending this policy, the author has given due regard to the Public Sector Equality Duty; that is, they have considered any potential impact on people who share certain protected characteristics. These protected characteristics are defined as: race, disability, sex, age, religion or belief, sexual orientation, pregnancy and maternity and gender reassignment.