



CHARGING & REMISSION POLICY

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0. Document Control

The table below contains the changes made between the different final editions of this document set for approval. This is to help provide information to those reviewing and approving the document of the changes being made.

Document Edition	Section	Details of change
1.0	All	Updated so that there is one policy across the Trust, previously different versions for each school.
1.1	Various	Aesthetic changes made re cover sheets and document control, plus update definitions

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1. Definitions

The “Trust” refers to all schools within the University Schools Trust, East London and all Trustees, Governors and staff who work within it.

A “School” refers to an individual academy within the Trust, as denoted by their Unique Reference Number. As such a ‘school’ may span one or several phases of education to the individual academies within the Trust. Depending on the context the term “School” may refer to a singular academy or to all of the academies within the Trust but as separate entities.

“Staff” refers to any individual who is employed by a school or who operates on a schools’ behalf, e.g. Trustees and Governors.

A “Charge” refers to a fee payable for specifically defined activities.

A “Remission” refers to the cancellation of a charge which would normally be payable.

The “Accounting Officer” is a role appointed by the Board of Trustees and should be the senior executive leader, i.e. the Trust Leader. The accounting officer role includes specific responsibilities for financial matters.

The “Chief Financial Officer” is a role appointed by the Board of Trustees , who is the Trust’s Director of Finance and Operations (DFO). Responsibility for the Trust’s detailed financial procedures are delegated to the Chief Financial Officer.

2. Scope of the Policy

The purpose of the Charging and Remission Policy is to:

- Have robust, clear processes in place for charging and remissions
- Clearly set out the types of activity that can be charged for and when charges will be made

3. Policy Aims and Ethos

The University Schools Trust, (the Trust) wishes to make a broad programme of activities accessible to as many student as possible, recognising the valuable contribution that the wide ranges of additional activities, including trips, clubs and residential experiences can make towards pupils’ education at the Trust’s constituent academies to which this policy applies.

This policy is intended to maintain a fair and coherent system of charges and remissions within the constraints of the School budget. It also defines other circumstances when the Trust may wish to ask for voluntary contributions. The School Committees of the constituent academies aim to promote and provide such activities both as part of a broad and balanced curriculum for the pupils of each Academy and as additional optional activities.

3.1. Charging

No student should have their access to the curriculum limited by charges.

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3.2. Voluntary contributions

Where a charge cannot be made (as is the often the case for activities which are an essential part of the curriculum, or religious education) parents may nevertheless be asked to make a voluntary contribution. The matter of a voluntary contribution will not be a factor in deciding whether a student is allowed to participate in an activity to be financed by voluntary contributions.

3.3. Remissions

The Trust will apply the statutory minimum remissions to any charges that they make. However no student shall be placed at an educational disadvantage because of a parent's unwillingness or inability to contribute. In the case of particular need, remission outside these parameters will be at the absolute discretion of the Executive Headteacher / Headteacher or equivalent of the individual academy.

3.4. Liability for personal property

The Trust does not accept liability for any items of personal property lost or damaged in any of the academies, although in exceptional circumstances a contribution to the replacement of a lost or damaged item may be made at the absolute discretion of the Executive Headteacher / Headteacher or equivalent of the individual academy.

4. Links to Legislation and Guidance Documents

This policy is based on advice from the Department for Education (DfE) on [charging for school activities](#) and [the Education Act 1996](#), sections 449-462 of which set out the law on charging for school activities in England. Academies are required to comply with this Act through their funding agreements.

This policy complies with our funding agreement and articles of association.

The law states that education provided during the core school hours must be free of charge. This definition includes materials, equipment and transport (including public transport, where necessary, to work placements or other offsite education provision) provided in the core school hours by each Academy. No pupil may be left out of an activity because their parents/carers cannot or will not make a contribution of any kind.

However, the Trust reserves the right to levy a charge in any circumstances permissible under statute as detailed below. When charges are to be made, the individual academy reserves the absolute right to determine whether the activity has to be cancelled if an insufficient number of families are prepared to pay for the activity to take place.

5. Roles and Responsibilities

5.1. Trust Board

The governing board also has overall responsibility for monitoring the implementation of this policy.

5.2. Resources committee

Responsibility for approving the charging and remissions policy has been delegated to the Resources Committee.

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5.3. Headteachers

The headteachers are responsible for ensuring staff are familiar with the charging and remissions policy, and that it is being applied consistently.

5.4. Staff

Staff are responsible for:

- Implementing the charging and remissions policy consistently
- Notifying the headteacher of any specific circumstances which they are unsure about or where they are not certain if the policy applies

The school will provide staff with appropriate training in relation to this policy and its implementation.

5.5. Parents

Parents are expected to notify staff or the headteacher of any concerns or queries regarding the charging and remissions policy.

6. Charging Policy

6.1. Activities which are an essential part of the national curriculum, religious education or for a public examination.

6.1.a. Charging:

It is not normally possible to charge for these activities.

Where a charge is allowed (see below), it may not exceed the cost that can be apportioned to the student's participation. If the cost of the chargeable element of an activity is expected to exceed the sum of the charges received then the organiser should ensure funds to balance are available by reference to the Executive Headteacher / Headteacher or equivalent of the individual academy.

The individual academy may make a charge where the law permits it for:

- the cost of board and lodging for all residential activities and / or visits [subject to full remission being given to those students whose parents are receiving Income Support, Working Families Tax Credit, Disabled Persons Tax Credit or income-based Jobseekers' Allowance],
- activities that take place during lunch,
- the services of a non-Trust organisation employed during the school hours,
- materials used in the production of an article where the student's parent has indicated in advance that he/she wishes the article to be owned by the student, (NB where a parent declines to offer to pay for materials used in the production of an article where otherwise it would be expected that the student's parent would have indicated in advance that he/she wishes the article to be owned by the student then the student shall undertake the exercise but not be allowed possession of the article on completion),
- books, materials, equipment; instruments or incidental transport provided in connection with the national curriculum, religious education or for prescribed public examinations or courses taught at the school, where parents have indicated in advance their wish to purchase the product,

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- public examinations, where the school has not prepared students for the examination for the examination in the year for which the entry is made (i.e. an examination on the individual school's set list has not been studied for by the student at school; or the examination is not on the individual school's set list); or a student has failed, for no good reason, to complete the requirements of the examination or to attend for it; or where a student has requested to resit* a module.

*Examination re-sits: Where a school judges it to be beneficial to the educational progress of pupils to re-sit examinations, the school will fund the entry fees. In cases where pupils are entered to re-sit examinations at the request of parents/carers, despite the school's view that the re-sit will not be beneficial, parents/carers will fund the entry fees.

6.1.b. Voluntary contributions

These may be asked for, but this must be done in line with the stated objectives of this policy. That is, voluntary contributions can be requested from parents for school activities in or out of school time for which compulsory charges cannot be levied but which can only be provided if there is sufficient voluntary funding, whilst ensuring that no student is excluded from such activity by reason of inability or unwillingness to make a voluntary contribution.

Organisers of activities may ask for voluntary contributions to cover the costs of:

- travel, board and lodgings
- materials, books and equipment
- teaching costs including supply cover
- associated administrative and support staff costs
- tickets and entrance fees.

The organiser is expected to have constructed a balanced budget in advance. When arranging an activity the voluntary contribution requested may be set to cover the direct cost per student, fixed overhead costs and where appropriate, with an allowance for a contingency.

When writing to parents the benefit and educational aims of the activity must be described along with any risks associated. A request for voluntary contributions must make it clear that:

- there is no obligation to make a contribution,
- no student will be treated differently or not allowed to participate according to whether a contribution has been made,
- it may be necessary to cancel an activity if voluntary contributions received are insufficient to meet the costs of the activity.

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6.2. Activities available to our students that take place wholly outside, or mainly outside, school hours that are NOT AN ESSENTIAL PART of the national curriculum, religious education or for an approved examination ('extra-curricular activities')

6.2.a. Charging

A charge may be levied in order to support the wide range of additional extra-curricular activities arranged by the individual academy. The organisers of activities will normally determine a charge to cover the costs of:

- travel, board and lodging
- materials, books and equipment
- teaching costs including supply cover
- associated administrative and support staff costs
- tickets and entrance fees.

For an extra-curricular activity the charge should be set to cover the direct cost per student, fixed overhead costs and where appropriate, an allowance for a contingency to cater for any reasonable unforeseen shortfall in income or increase in expenditure.

When writing to parents the benefit and aims of the activity must be described along with any risks associated (also cover any policy regarding remissions).

6.2.b. Acts of Vandalism and Negligence

The Trust reserves the right to recover part, or the whole cost, of damage to buildings or equipment because of vandalism or negligence by a student.

7. Remissions

There will be no obligation for any parent to make a voluntary contribution towards the cost of Academy activities.

The School Committee may wish to remit in full or in part the cost of other activities for particular groups of parents/carers, for example, in the case of family hardship. Pupils will not be treated differently whether or not their parents/carers have made a contribution. When arranging a chargeable activity such parents/carers will be invited in confidence for the remission of charges in full or in part.

A remissions policy exists whereby parents who are in receipt of Income Support or Family Credit, and are having difficulty in finding the full cost of trips and extra-curricular activities, may apply for assistance. In some circumstances financial assistance towards the cost of instrumental tuition may also be considered.

Financial support will be dependent upon:

1. The School receiving at least six weeks' notice in order to make a decision concerning assistance for a trip.
2. The completion of a form, the design of which is intended to establish the degree of need by inviting parents to indicate their income and outgoings.

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3. Whether the trip is part of curriculum time; whether, if not in curriculum time, it is linked to a school activity or whether it is entirely outside school time.

To leave to the Head's decision, the proportion of costs of an activity which should be charged to public or non-public funds;

To delegate to the Executive Headteacher / Headteacher or equivalent of the individual academy in consultation with the Chair of the School Committee will make authorisation for such remission.

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8. Appendix 1 – Key Members of Staff Referenced

Role	Current Member of Staff
Accounting Officer	Gillian Kemp
Director of Finance and Operations	Richard Dearing

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9. Approval Signature

Signature of (enter position e.g. Chair) _____

Print name _____

Date _____

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