

Charging and Remissions Policy

Southmead Primary School



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Version History

No.	Description of changes made	Date revised
4	Annual review of policy and to include Pre-School	29.4.2025 23.4.24
3	Annual review of policy	25.4.2023
2	Inclusion of Refund section	March 2022
1	Current policy adopted at FGB	24.11.2020

Contents

1. Aims	4
2. Legislation and guidance	4
3. Definitions	4
4. Roles and responsibilities	4
5. Where charges cannot be made	4
6. Where charges can be made	5
7. Voluntary contributions	6
8. Activities we charge for	6
9. Remissions	6
10. Refunds	6
11. Monitoring arrangements	6
Equality Impact and Needs Assessment Form	8

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1. Aims

Our school aims 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.

2. Legislation and Guidance

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.

3. Definitions

Charge: a fee payable for specifically defined activities

Remission: the cancellation of a charge which would normally be payable

4. Roles and responsibilities

4.1 The Governing Board

The governing board has overall responsibility for approving the charging and remissions policy, but can delegate this to a committee, an individual governor or the headteacher.

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

4.2 Headteachers

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

4.3 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.

4.4 Parents

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

5. Where Charges Cannot be Made

Below we set out what we **cannot** charge for:

5.1 Education

- 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.
 - A syllabus for a prescribed public examination that the pupil is being prepared for at the school.
 - Religious education.
- Instrumental or vocal tuition, for pupils learning individually or in groups, unless the tuition is provided at the request of the pupil's parent.
- Entry for a prescribed public examination if the pupil has been prepared for it at the school.
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school.

5.2 Transport

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

5.3 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.
 - a syllabus for a prescribed public examination that the pupil is being prepared for at the school.
 - religious education.
 - supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential visit.

6. Where charges can be made

Below we set out what we **can** charge for:

6.1 Education

- Any materials, books, instruments or equipment, where the child's parent wishes him or her to own them.
- Optional extras (see below).
- Music and vocal tuition, in limited circumstances.
- Certain Early Years provision.
- Community facilities.

6.2 Optional extras

We are able to charge for activities known as 'optional extras'. In these cases, schools can charge for providing materials, books, instruments or equipment. The following are optional extras:

- Education provided outside of school time that is not part of:
 - the national curriculum.
 - a syllabus for a prescribed public examination that the pupil is being prepared for at the school.
 - 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 local authority or governing 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 (such as 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:

- any materials, books, instruments or equipment provided in connection with the optional extra.
- the cost of buildings and accommodation.
- non-teaching staff.
- teaching staff engaged under contracts for services purely to provide an optional extra (including supply teachers engaged specifically to provide the optional extra).
- the cost, or an appropriate proportion of the costs, for 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 be greater than the actual cost of providing the optional extra activity, divided equally by the number of pupils participating.

Any charge will not include an element of subsidy for any other pupils who wish to take part in the activity 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 charge cannot include the cost of alternative provision for those pupils who do not wish to participate.

Parental agreement is necessary for the provision of an optional extra which is to be charged for.

6.3 Music tuition

Schools can charge for vocal or instrumental tuition provided either individually or to groups of pupils, provided that the tuition is provided at the request of the pupil's parent.

Charges may not exceed the cost of the provision, including the cost of the staff giving the tuition.

Charges cannot be made:

- if the teaching is an essential part of the national curriculum.
- if the teaching is provided under the first access to the Key Stage 2 instrumental and vocal tuition programme.
- for a pupil who is looked after by a local authority.

6.4 Residential visits

We can charge for board and lodging on residential visits, but the charge must not exceed the actual cost.

7. Voluntary contributions

As an exception to the requirements set out in section 5 of this policy, the school is able to ask for voluntary contributions from parents to fund activities during school hours which would not otherwise be possible.

Some activities for which the school may ask parents for voluntary contributions include:

- educational visits.
- sports activities.
- Nominal sum for school – run arts club.

There is no obligation for parents to make any contribution and no child will be excluded from an activity if their parents are unwilling or unable to pay.

If the school is unable to raise enough funds for an activity or visit then it will be cancelled.

8. Activities we charge for

The school will charge for the following activities:

- Southmead Plus – Breakfast and After School Club.
- Southmead Pre-School.
- some after school sports clubs. (This would be a nominal charge to cover costs only e.g. hire of facilities. No profit is made from these clubs.)

For regular activities, the charges for each activity will be determined by the governing board and reviewed each year. Parents will be informed of the charges for the coming year once charges are determined by the governing body.

9. Remissions

In some circumstances the school may not charge for items or activities set out in sections 6 and 8 of this policy. This will be at the discretion of the governing board and will depend on the activity in question.

9.1 Remissions for residential visits

Parents who can prove they are in receipt of any of the following benefits or are experiencing exceptional hardship will be exempt from paying part or all of the cost of board and lodging for residential visits.:

- 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 Working Tax Credit is not also received, and the family's annual gross income does not exceed £16 190)
- Working Tax Credit run-on (this is paid for 4 weeks after an individual stops qualifying for Working Tax Credit)
- Universal Credit (if the application was made on or after 1 April 2018, the family's income must be less than £7 400 per year – after tax and not including any benefits)

10. Refunds

- The amount under which the surplus is too small for refunds to be given and in this case school will keep it is £5 per pupil.
- Parents will be made aware of this amount when instructions are given to them for the item they are being charged for.
- Surplus money will be used to fund future trips
- When deciding the amount of £5 we have considered: the affluence and attitudes of parents, how simple it is to arrange refunds on our accounting system.

11. Monitoring arrangements

The School Business Manager monitors charges and remissions and ensures these comply with this policy.

This policy will be reviewed by the Governing Body every year. At every review, the policy will be approved by the governing body.



Equality Impact and Needs Assessment Form

A) Description

1. Who does the policy relate to? What is their involvement with the policy?

The Policy relates to all pupils and activities at Southmead. The Policy is there to ensure that there is clarity over those items which the school will provide free of charge and for those items where there may be a charge.

2. Are there any concerns at this stage which indicate the possibility of inequalities / negative impacts? For example: complaints, comments, research, outcomes of a scrutiny review. Please describe:

None. Where charges for activities are permitted to be made by the governing body the Head Teacher will set a cost towards which parents will be invited to make a voluntary contribution by an arranged date. No child will be excluded from the activity if their parents are unable to make a contribution. Whilst cases of hardship are considered, this applies to all pupils, and would apply to any pupil who is found to be 'a case of hardship'.

3. Is the policy consistent with the School's equality policies? If yes, the EIA is complete

Yes