

Appendix E to the Financial Regulations Manual
Charging & Remissions Policy



Appendix E Charging & Remissions Policy

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Version	Amendment Date	Author	Amendment Summary
1	October 2023	Kim Bowgin	New policy - approved by Board of Directors

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1) Purpose of the Policy:

We believe that all our students should have an equal opportunity to benefit from school activities and visits (curricular and extracurricular) independent of their parents' financial means. This charging and remissions policy describes how we will do our best to ensure a good range of visits and activities is offered and, at the same time, try to minimize the financial barriers which may prevent some students taking full advantage of the opportunities.

2) Consultation process:

This policy was developed in consultation with the FAR Committee.

3) Relationship to other policies:

Financial Regulations Manual
Appendix F – Lettings Policy
Appendix G – Debt Recovery Policy

4) Charges

The Newman Catholic Trust is required by law to publish a policy detailing its charges for its schools' activities. It is the intention of the Trust that no pupil will be disadvantaged by this policy. The Education Act 1996 establishes the following basic principle that schools cannot charge for:

- an admission application to any maintained school
- education provided during school hours (including supply of any materials, books, instruments, or other equipment)
- 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.
- tuition for students learning to play musical instruments (or singing) 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.
- 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.

However, the Board of Directors will charge for 'Optional Extras':

- Education provided outside of school time that is not:
 - part of the National Curriculum

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- part of a syllabus for a prescribed public examination that the student is being prepared for at the school
- part of religious education
- Examination entry fees(s) if the student has not been prepared for the examinations at the school.
- Early years - children attending Nursery are eligible for 15 hours per week free provision (in line with Government guidelines and thresholds around free childcare provision). Children attending in excess of this (as agreed with the school) will be charged, either indirectly via the 30 hours funding eligibility system or in the event of eligibility expiring, the charge will be made directly to the parent(s) including any arrears of payments.
- Music tuition – charges may be made for vocal or instrumental tuition provided either individually or to groups of any size, where the tuition is provided at the request of the pupil's parent.
- Ingredients / materials – a charge can be made to cover the cost of e.g. food technology ingredients, design technology materials, arts and crafts, where parents have indicated in advance that they would like their child to bring home the finished product.
- Extended day services – the school may charge for out of hours services e.g. breakfast club, after school club, supervised homework/revision sessions.
- Deliberate damage to or loss of school property – parents may be required to make reimbursement towards the cost of repair and/or replacement.
- Community facilities – schools are permitted to provide and charge for facilities that can be used by the local community for the benefit of pupils attending the school, their families or people who live or work in the locality of the school e.g. out of hours and holiday clubs, swimming pool sessions.
- Transport that is not required to take the student to school or to other premises where the Board of Directors have arranged for the student to be provided with education: and
- board and lodging for a student on a residential visit.

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
- non-teaching staff
- teaching staff engaged under contracts for services purely to provide an optional extra i.e., supply staff

Any charge made in respect of individual students must not exceed the actual cost of providing the optional extra activity, divided equally by the number of students participating.

Furthermore, 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 students 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 students on a residential visit.

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Participation in any optional extra activity will be on the basis of parental choice and willingness to meet charges. Therefore, parental agreement is a necessary prerequisite for the provision of an optional extra where charges will be made.

5) Voluntary Contributions

It is acceptable for schools to ask for voluntary contributions to fund school activities. Where a school is unable to raise the necessary funding for an activity (from any source) then it must be cancelled. This possibility should be communicated to parents at the outset.

- If the activity cannot be funded without voluntary contributions, the Board of Directors or Executive Principal/Principal/Head of School should make this clear to parents at the outset.
- The Board of Directors or Executive Principal/Principal/Head of School must also make it clear to parents that there is no obligation to make any contribution.
- No student should be excluded from an activity simply because his or her parents are unwilling or unable to pay.
- If insufficient voluntary contributions are raised to fund a visit, then it must be cancelled.
- The school will make it clear from the outset what its policy for allocating places on school visits will be.

6) Remission/Accepted Benefits for Financial Support

Children of parents on low income or in receipt of benefits listed below qualify for free school meals and Pupil Premium funding and may be entitled to financial support towards the cost of school activities where a charge is being levied. Where a school informs parents about a forthcoming activity, it must be made clear that those in receipt of benefits listed below and who have made a successful application for free school meals will be eligible for financial assistance. Remission may consist of part or all of the fees according to individual circumstances and dependant on the activity. All questions of remissions will be dealt with in the strictest confidence. The school will require written proof of entitlement to provide remission of fees. The level of remission / financial support available to parents will be at the discretion of the individual school's Executive Principal/Principal/Head of School. Appeals against decisions made with reference to this policy should be made in writing to the school Executive Principal/Principal/Head of School and will be dealt with by the relevant local or Newman Trust committee with oversight of the curriculum:

- Income Support
- Income-based Jobseekers 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

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- Child Tax Credit (provided you're 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 you stop qualifying for Working Tax Credit

The Act prohibits us from charging directly for the cost of visits which take place during school time. Since funds to cover these activities are limited, we can either abandon all such visits or continue them with parents making voluntary contributions to cover the costs.

Board of Directors adopted the following policy on charges for school activities across the Academy:

- The principles of the Fair Access Division charging guidance is to be accepted.
- In order that educational visits and residential activities continue and be properly funded and staffed, they should all be regarded as 'voluntary' activities for which parents would make a voluntary contribution. In this way the viability of a particular activity may be assessed at an early stage.
- Full remission of charges for those qualifying be made from alternative sources of funding - notably School Fund.
- The school act as 'agent' for tour companies, for appropriate and approved activities e.g. ski trips.
- Responsibility for deciding on the suitability of any visits or residential activities and for the granting of any required leave of absence be delegated to the Executive Principal/Principal/Head of School, subject to the Board of Directors, through the Chair, being kept fully informed on such matters.
- Regarding public examinations, parents be fully liable for any fees incurred through:
 - Late withdrawal of any entry.
 - Non-attendance at an examination unless good reason (e.g. Doctor's note) be given.
 - Serious misconduct in an examination leading to exclusion.
 - A re-sit examination supported by the SLT or Executive Principal/Principal/Head of School where they are no longer being prepared for this.
- For particular curriculum activities parents may be required to provide equipment or materials for that activity to take place within the rules of the school. Examples would include:
 - Suitable footwear for activities: e.g. in craft Workshops and for sporting activities (football/ hockey boots).
 - Materials for Craft and Food Technology activities where the parents have agreed in advance to own the finished product.
 - For vandalism of school property or equipment or for loss of books or equipment, a charge to be made to parents at a level to be negotiated by the Principal.
- This policy to be reviewed and amended as necessary.

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7) Educational Trips & Residentials

The Education Reform Act prohibits us from charging directly for the costs of visits which take place in school time. Since funds to cover such proposed activities are limited, we can either abandon all such visits or continue them with Parents making voluntary contributions to cover the costs. We consider that the visits we offer are of great benefit educationally and propose to attempt to continue with them as described.

Accordingly, when a visit is proposed, it will be assumed that everyone who expresses an interest to go is prepared to make a voluntary contribution of the full amount as soon as it is evident that the level of support will make the visit viable. This collection of donations will usually take place as soon as we know there is sufficient support. If, in the event, not all donations are forthcoming we reserve the right to cancel the visit since we are forbidden to differentiate between those who make a donation and those who do not. Those parents who are in receipt of a benefit will be exempt from paying the cost of board and lodging. See Educational Visits Policy.

8) Principal circumstances in which charging is permissible under the Act

Board and lodging on residential visits the charge may not exceed the actual cost.

Charges for teaching either an individual student or groups of an appropriate size to play a musical instrument or to sing. Charges may only be made if the teaching is not an essential part of either the National Curriculum or a public examination syllabus being followed by the student.

Activities which take place wholly or mainly outside school hours. However, a charge can only be made for the activity if it is not part of the National Curriculum, not part of a syllabus for a prescribed public examination is being prepared for at the school and not part of religious education.

The cost of entering a student for a public examination not prescribed in regulations, and for preparing the student for such an examination outside school hours.

Re-sits of prescribed public examinations where no further preparation has been provided by the school.

Any books, materials, instruments or equipment where the child's parent wished him to own them.

9) Role and Responsibilities

Board of Directors

Board of Directors will need to determine their own charging and remissions policies which may be more or less generous than the policies of the LA provided that they meet the requirements of the law.

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For each of the areas of charging and remissions, the policy should detail the responses in each case.

Executive Principals/Principals/Heads of School

When evidence of receipt of benefits is received a standard reduction of 20% is offered, if the parent is in a position to voluntarily contribute to the activity.

If a parent is unable to contribute but is not in receipt of a recognised benefit a contribution of any amount should be requested.

Once a parent has been approached with an offer and it is established a contribution cannot be made, then the Group Leader and Business Director should be notified to make alternative financing arrangements.

Before a decision can be made a request should be made in writing showing evidence of hardship and support agreed by the relevant Executive Principal/Principal/Head of School.

10) Monitoring & Review:

The Trust will review this policy every year and assess its implementation and effectiveness.

Board and/or Committee members will oversee the internal audit arrangements; providing the appropriate level of support and challenge to ensure that the agreed practice and procedure has been implemented through:

- Scrutiny of all reporting information requested and received
- Identification of any associated risks, trends, underlying or contributory factors
- Assessing any opportunities for change to enhance existing practice and achievement of the Trust's vision
- Making decisions in respect of any proactive and/or mitigating action to be taken
- Evaluating the impact and effectiveness of policy and practice in line with the agreed policy review schedule or as necessary.

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Activity	Direct Charge Permissible	Charges on a voluntary basis	Remission arrangements
1 Residential - outside school hours and not part of curriculum <i>optional</i>	1 Board and Lodging (Actual Cost only) 2 Cancellation Charges (Actual) 3 Travel 4 Insurance 5 Essential Clothing 6 Expenses of employees, supply staff	1 Subsidy to cover any other expenses.	1 LA - None 2 Directors - to assess individual cases determine and fund if agreed 3 No student to be excluded from activity other sources of funds to be accessed.
2 Residential - mainly during school hours and part of curriculum Those inside/outside school hours required by NC or syllabus of prescribed public exams.	1 Board and Lodging (Actual Cost only) 2 Cancellation Charges (Actual)	1 Transport 2 Admission to Places of Interest 3 Expenses of Employees 4 Subsidy to cover any other costs	1 Directors must remit to families unable to pay
3 Residential arranged by Body other than LA or Board of Directors where leave of absence granted Independent tour company	As for Residential - Outside School Hours and Not Part of Curriculum		
4 Boarding Education	1 Board and Lodging	1 Where Boarding is a result of Statement of Special Educational 2 Needs under 1981 Act Where student is placed in Boarding by LA	1 Remission on income related scale as determined by LA from time to time

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5 Individual Music Tuition either during or outside school hours and not part of the curriculum	1 Tuition Fees 2 Sheet Music 3 Insurance on Instrument 4 Negligence/Abuse of Instrument 5 Travel Costs of Students		1 Travel Costs for students in exceptional Circumstances.
6 Group Musical Activities either during or outside school hours and not part of the curriculum.	1 Personal Sheet Music 2 Travel Costs 3 Contribution to expenses of adults engaged to assist with activity	1 Sheet Music for Orchestra/Band	2 Travel Costs for students in exceptional Circumstances.
7 School Activities wholly or mainly outside school hours – optional extras e.g. lunchtime clubs theatre visits, sports events, language classes. optional	1 Membership Subscription 2 Travel Costs 3 Materials 4 Expenses of Staff engaged on separate Contract	All Other	1 Directors – to assess individual cases and fund if agreed Language Classes – Wholly funded by LA
Activity	Direct Charge Permissible	Charges on a voluntary basis only	Remission arrangements
8 Non-residential School Activities wholly or mainly during school hours – organised by LA or Academy Committee Cannot charge	1 None	1 Transport costs 2 Admission charges 3 Expenses of accompanying adults on separate contract.	1 Directors must remit to families unable to pay 2 No student to be prevented from participating for financial reasons.

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<p>9 Non residential activities organised by third party ie: not LA or governors for which students have been given holiday leave of absence – defined as optional extra</p> <p>Optional Activity</p>	<p>1 Transport for students. 2 Admission charges 3 Materials, books, equipment. 4 Insurance (Personal Accident) 5 Teaching and non-teaching staff costs if on separate contract.</p>		<p>1 Directors – to assess individual cases and fund if agreed</p>
<p>10 Public Examinations</p>	<p>1 Scrutiny of results 2 Prescribed wasted entry 3 Any non-prescribed examinations 4 Resit for which school has not provided tuition. 5 Re-sit for which tuition took place outside of school hours</p>	<p>1 Any non-prescribed examination</p>	<p>1 LA to remit music exam fees for students in receipt of family credit or income support. 2 School to define wasted exam entry and re-sit requirement.</p>
<p>11 Curriculum Activities eg:DT, PE</p>	<p>1 Parents to provide appropriate clothing e.g.: cookery apron, football boots. 2 Loss or damage of school equipment, e.g., textbooks, vandalism against stated school policy. 3 DT materials – where parents have agreed in advance to own the finished product.</p>	<p>1 Any materials, books, equipment.</p>	<p>1 Directors must remit families unable to pay 2 Schools to define period of advanced notice required for provision of materials to be retained. 3 Withhold items if prior arrangements not made or charges not paid.</p>
<p>12 Leavers Dinner and Prom</p>	<p>1 Meal and entertainment</p>		<p>1 None</p>

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13 Stationery	1 Where a parent wishes a student to own these items.	1 Any equipment required for preparation for the school day.	1 Directors must remit families unable to pay
14 Charitable items, donations e.g., raffles, collections etc	1 Full cost to all who participate		1 None