



# HART SCHOOLS TRUST

## **CHARGES, REFUNDS AND REMISSIONS POLICY**

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## **1. STATEMENT OF INTENT**

The Hart Schools Trust (HST) wishes to ensure that all students are able to join in all areas of life at our academies regardless of the ability of an individual student's parents or carers to pay for such activities.

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 minimise the financial barriers which may prevent some students taking full advantage of the opportunities.

## **2. ACTIVITIES FOR WHICH CHARGES WILL NOT BE MADE**

No charges will be made for:

- 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 or part of the school's basic curriculum for religious education.
- Tuition for students learning to play musical instruments (or singing) if the tuition is required as part of the National Curriculum.
- 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 the school's basic curriculum for religious education.

## **3. VOLUNTARY CONTRIBUTIONS**

To enable the Trust to continue to offer a range of activities and outings, parents are asked to make voluntary contributions in certain circumstances. If a parent wishes their child to take part in a school trip or event, but is unwilling or unable to make a voluntary contribution, sometimes, the school pays additional costs in order to support the visit so that a child can participate fully in the trip or activity. If the academy does not receive sufficient voluntary contributions, the activity may not go ahead.

The Trust has the right to make a charge for optional extras. In respect of activities organised by academies during academy hours, parents may be expected to pay for individual or group music tuition, travel, board, lodging and travel element of all residential visits, and activities arranged by a third party such as a travel agent or tour company.

### *Charges for activities which fall wholly or mainly outside academy hours*

This will not include any activity which is required by the curriculum syllabus or to fulfil statutory duties relating to curriculum content and delivery.

Charges made for such activities may include an element for travel, board and lodging, materials, books, instruments or other equipment, non-teaching staff accompanying as responsible adults, entrance fees to museums, theatres etc., and insurance costs.

These will be on the basis of full costs, and the detailed administration of this will be at the discretion of the individual Academy Headteacher. The academy will inform parents beforehand of the basis for such contributions, and of the arrangements for payment.

Parents have the right to know how each trip is funded and the academy can provide this information on request.

## 4. ACTIVITIES FOR WHICH CHARGES MAY BE MADE

### *a) Activities outside school hours*

Non-residential activities (other than those listed in 2 above) which take place outside school hours, but only if the majority of the time spent on that activity takes place outside school hours (time spent on travel counts in this calculation if the travel occurs during school hours).

### *b) Residential activities*

Board and lodging costs (but only those costs) of residential trips deemed to take place during school time. However, pupils whose parents are in receipt of certain benefits (see point 9 below) may not be charged for board and lodging costs.

Residential trips deemed to take place outside school time (other than for those activities listed in 2 above).

### *Is a residential trip in or out of school time?*

If the number of school sessions on a residential trip is equal to or greater than 50% of the number of half days spent on the trip, it is deemed to have taken place during school hours (even if some activities take place late in the evening). Whatever the starting and finishing times of the school day, regulations require that the school day is divided into two sessions. A 'half day' means any period of 12 hours ending with noon or midnight on any day.

When any trip is arranged, parents will be notified of the policy for allocating places.

## 5. COMMUNICATION

The governing body recognises its responsibility to ensure that the offer of activities and educational visits does not place an unnecessary burden on family finances. To this end, we will try to adhere to the following guidelines:

- Where possible each academy will details of visits (and their approximate cost) three months in advance so that parents can plan ahead.
- Where possible the academy will establish a system for parents to pay in instalments.
- When an opportunity for a trip arises at a discounted rate the academy may need to book this at short notice. In this instance it will be possible to arrange to pay by instalments beyond the date of the trip.
- The Trust acknowledges that offering opportunities on a 'first pay, first served' basis discriminates against pupils from families on lower incomes and we will avoid that method of selection. Students will be asked to complete an expression of interest form before their place is confirmed. When any trip is arranged, parents will be notified of the policy for allocating places.

## 6. REFUNDS

If after completion of a trip or journey a surplus exists, the money will be applied as follows:

1. If the surplus is greater than 5% of the contribution per head, subject to a minimum of £5, then a refund of the full amount of the surplus will be offered to parents.
2. If the surplus is less than 5% of the contribution per head or less than £5, the surplus will be placed in the academy fund.

## **7. CHARGING FOR RESOURCES**

Should parents or students wish to own a completed product produced as part of the curriculum, a charge may be made for the cost of materials, ingredients and equipment (or the provision of them by parents). This charge will be subject to parents having indicated in advance that they wish to own the finished product.

If student wants to produce a project outside the range required if the curriculum specification, or one that is of a greater cost of the options provided by the academy, their parent will have to cover the full cost of such a project.

## **8. PORTABLE IT EQUIPMENT**

Where portable IT devices are available for loan, students wishing to take them home will be expected to pay a deposit for the device and for the insurance cost covering home usage. The deposit amount will be agreed on an annual basis and communicated to parents.

## **9. REMISSIONS**

No student is ever excluded from an activity for financial reasons and there is remission of charges in cases of financial difficulty. Each case is to be judged on its individual merits. Where a residential trip takes place wholly, or mainly, during academy hours and where it forms part of the syllabus for a prescribed public examination or the National Curriculum, students whose parents are in receipt of the support payments listed below will, in addition to having a free academy lunch entitlement, also be entitled to the remission of the charge for board and lodging.

Criteria for qualification for remission are given below:

- Income Support;
- Income-based Jobseeker's Allowance;
- Support under part VI of the Immigration and Asylum Act 1999;
- Child Tax Credit provided the parent is not entitled to Working Tax Credit and their annual income, assessed by Her Majesty's Revenue and Customs does not exceed the annual limit;
- Students who receive Income Support or Income Based Jobseekers Allowance in their own right are also entitled to free academy meals;
- Parents in receipt of the guaranteed element of State Pension Credit are also entitled to free academy meals.

Additional categories of parents may claim help with some costs in some circumstance.

## **10. PUBLIC EXAMINATIONS (SECONDARY ACADEMIES)**

Candidates will not be charged for changes of tiers, withdrawals made by the proper procedures or alterations arising from administrative processes provided these are made within the time allowed by the awarding bodies.

However, an examination entry fee may be charged in the following circumstances:

- Candidates decide to sit an exam after the late entry/withdrawal deadline/fail to sit an exam without medical evidence or evidence of other mitigating circumstances.
- Entry fees for re-sit exams requested by Candidates need to be paid by the Candidates.
- Retake entries will only be accepted by the Examinations Manager upon receipt of the relevant fee and an application form signed by the candidate.
- A student has asked to sit an examination outside the standard curriculum offering.
- A student fails, without good reason, to complete the requirements of any public examination where the Academy originally paid, or agreed to pay, the entry fee.
- A fee will normally be applied for examination retakes.

## **11. MUSIC LESSONS**

The academy will usually charge the full fee for peripatetic music lessons. Parental consent will be obtained before a charge is made.

The academy may decide not to charge fees for particular groups of students, for example those taking additional music lessons who are also studying for a public examination in Music. The Trust will review costs and group exemptions annually, and the academy will give a minimum of four months' notice to any parent whose exemption is to be ended.

If a student fails, without good reason, to attend their music lesson, where the Academy originally paid for these lessons, the lessons may be withdrawn at the discretion of the Head of Music.

## **12. SWIMMING (PRIMARY ACADEMIES)**

Children in Key Stage 2 are offered swimming lessons. These take place in school time and are part of the National Curriculum. The academy will ask for a voluntary contribution towards this activity to meet the cost of the tuition and for the transport to and from the swimming pool. The academy will inform parents when these lessons are to take place and we ask parents for their written permission for their child to take part in swimming lessons.

## **13. WAIVERS**

Trustees expect that parents who volunteer to incur a charge from the academy should meet that obligation. In cases of financial hardship, the Headteacher may reduce or write off unpaid debts in accordance with the amounts set out in the Scheme of Delegation.

## **14. CONCLUSIONS**

This policy is designed to balance the desire of Trustees that every student should be able to participate in all the academy's activities with the need to ensure that extra-curricular and voluntary activities are as self-financing as possible.

The Trustees will monitor the impact of this policy by receiving on an annual basis a financial report on those activities that resulted in charges being levied, the subsidies awarded (without giving names) and the source of those subsidies. It will seek to evaluate the impact of the school's extended services on those children most in need of additional support.

## 15. RELATED ACADEMY POLICIES

**Statutory link** [http://www.legislation.gov.uk/uksi/1999/2255/pdfs/uksi\\_19992255\\_en.pdf](http://www.legislation.gov.uk/uksi/1999/2255/pdfs/uksi_19992255_en.pdf)

- Examination Policy and procedures.
- Educational visits.
- Scheme of Delegation.

Related policies can be viewed on request.