

The Crabtree Academy Trust

Crabtree Lane, Harpenden, Herts. AL5 5PU



Crabtree Infants' School
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Charging, Refunds and Remissions Policy

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| Name/Department of originator/author: | Katie Coxon, Policies Administrator |
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The Board of Directors shall conduct the Trust with a view to promoting high standards of educational achievement.

Crabtree Academy Trust is committed to eliminating discrimination, advancing equality of opportunity and fostering good relations between different groups. These factors were considered in the formation and review of this policy and will be adhered to in its implementation and application across the whole school community.

The Crabtree Schools will promote the fundamental British values of democracy, the rule of law, individual liberty and mutual respect and tolerance of those with different faiths and beliefs and will actively challenge pupils, staff or parents expressing opinions contrary to fundamental British Values, including 'extremist' views.

| Version | Date | Notes |
|---------|------------|---------------------------------|
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1. Purpose

Sections 449-462 of the Education Act 1996 set out the law on charging for school activities in schools maintained by local authorities in England. The Crabtree Academy Trust, through its funding agreement is required to comply with the law on charging for school activities. This policy is based on the DfE guidance, *Charging for School Activities*, issued October 2014

Subject to the limited exceptions referred to in this document, the Trust is not permitted to charge for education provided during school hours (including the supply of any materials, books, instruments or other equipment). When asking for contributions towards the cost of school visits, the Trust has a duty to inform parents on low incomes and in receipt of the benefits listed in Paragraph 5.1 of this document of the support available to them

2. Policy

The Crabtree Academy Trust recognises the valuable contribution that a wide range of additional activities, including clubs and visits can make towards a pupil's education. The Directors aim to promote and provide such activities for the pupils of The Crabtree Schools, as part of a broad and balanced curriculum and as additional optional activities.

The Trust believes that all pupils should have an equal opportunity to benefit from school activities and visits (both curricular and extra-curricular). The Trust aims to ensure that charges and remissions are applied consistently and fairly, and that they enable every pupil to access provision regardless of their family's financial circumstances.

The schools will do their 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 pupils taking full advantage of the opportunities.

3. School charging

3.1 Education

The schools are not permitted to make a charge for:

- an admission application to the schools;
- 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 curriculum¹, or part of 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.

A charge may be made for:

- any materials, books, instruments, or equipment, where the child's parent wishes him/her to own them;
- vocal or instrumental tuition provided either individually, or to groups of any size, 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 who provide the tuition.²
- community facilities³.

¹ It should be noted that 'part of the national curriculum' is not restricted to learning outside the classroom experiences that are specifically subject based (e.g. geography or science fieldwork) and include, for example, activities designed to fulfil requirements under the national curriculum 'inclusion statement' (e.g. developing teamwork skills).

² NB No charge may be made in respect of a pupil who is looked after by a local authority (within the meaning of section 22(l) of the Children Act 1989).

³ The powers to provide community facilities are under s.27(1) of the Education Act

3.2 Optional extras

Charges may be made for some activities that are known as 'optional extras'. Where an optional extra is being provided, a charge **can** be made for providing materials, books, instruments, or equipment. Optional extras are:

- transport (other than transport that is required to take the pupil to school or to other premises where the local authority/governing body have arranged for the pupil to be provided with education, e.g. transport provided in connection with an educational visit).
- board and lodging for a pupil on a residential visit;
- extended day services offered to pupils (for example breakfast club, after-school clubs, tea and supervised homework sessions).

In 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, this includes supply teachers engaged specifically to provide the optional extra; and
- 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 must not exceed the actual cost of providing the optional extra activity, divided equally by the number of pupils participating. It must not therefore include an element of subsidy for any other pupils wishing to participate in the activity whose parents are unwilling or unable to pay the full charge. 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 pupils 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 pupils on a residential visit.

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

3.3 Damage to property/equipment

The Trust reserves the right to ask for payment/contribution in the event of any breakage or damage to school property/equipment.

See *Appendix 1* for examples of charges made at The Crabtree Schools.

4. Voluntary contributions

The Trust strongly believes that visits and trips enhance and enrich pupils' learning and enjoyment of learning and it therefore supports the schools' desire to offer a wide range of experiences beyond the classroom.

As the schools' delegated funds will not cover the cost of such activities, the Trust allows the Headteachers to ask parents for a voluntary contribution towards the cost of activities which take place during the school day and which incur additional costs, for example day trips or visits from external providers.

- Best value will be sought in planning activities that incur costs for which a voluntary contribution is sought from parents.
- The contribution must be genuinely voluntary and the pupils of parents who are unable or unwilling to contribute will not be discriminated against: no pupil will be prevented from participating because his/her parents cannot or will not make a contribution.
- Letters requesting a voluntary contribution for an activity must indicate that there is no obligation to contribute and that pupils will not be treated differently according to whether or not their parents have made any contribution in response to the request.
- Voluntary contributions will not be requested from the parents of children eligible for Pupil Premium or Pupil Premium Plus.
- Where the shortfall from contributions towards the cost of day activities or visits is 5% or more, then the activity may be cancelled.

The Trust acknowledges that offering opportunities on a “first come, first served” basis is likely to discriminate against pupils from families on lower incomes and will avoid that method of selection. The usual expectation will be that trips and activities will be for all pupils in a particular year group.

4.1 Calculation of voluntary contributions

The requested contribution in respect of individual pupils will not exceed the actual cost of the activity, divided equally by the number of pupils participating. Although the calculation of costs may include a 5% contingency allowance it will not include any element of subsidy for other pupils participating in the activity whose parents are unable or choose not to make a contribution. The charge will not include the cost of alternative provision for those pupils 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 pupils on a residential visit. However, the cost of any additional hours worked by Teaching Assistants who accompany the visit will be taken into account.

4.2 Residential trips

Although the school can charge for board and lodging on residential visits (see above), no charge is permitted for the educational or travel elements. A voluntary contribution will therefore be sought to cover these costs.

4.3 Planning for voluntary contributions

The Trust recognises its responsibility to ensure that the offer of activities and educational visits does not place an unnecessary burden on family finances and acknowledges that parents will want to plan to meet the schools’ requests for voluntary contributions.

- Where possible, a list of visits (and their approximate cost) will be published at the beginning of the school term so that parents can plan ahead.
- When an opportunity for a trip arises at short notice it will be possible to arrange to make a voluntary contribution beyond the date of the trip.
- Parents will be given the option to pay in instalments for residential trips.

5. Remissions

5.1 Residential trips

Children will be entitled to the remission of the charge for board and lodging if their parents are in receipt of the following support payments:

- Universal Credit in prescribed circumstances;⁴
- Income Support (IS);
- Income Based Jobseekers Allowance (IBJSA);
- support under part VI of the Immigration and Asylum Act 1999;
- Child Tax Credit, provided that Working Tax Credit is not also received and the family's income (as assessed by Her Majesty's Revenue and Customs) does not exceed £16,190 (financial year 2014/15);
- the guaranteed element of State Pension Credit;
- an income related employment and support allowance that was introduced on 27 October 2008.

When Crabtree Junior School informs parents about the Year 5 and 6 School Journeys, it must make clear that parents who can prove they are in receipt of the benefits stated above will be exempt from paying the cost of board and lodging:

The Headteacher has discretion to offer further remissions and subsidies to these parents and additional categories of parents. In particular, parents who have explained genuine financial difficulties, which in the opinion of the Headteacher (and through consultation with Governors if deemed appropriate) justifies a subsidy towards these costs, may claim help from the school with costs.

The school will approach local charities, e.g. The Harpenden Trust, to support remissions and subsidies in order to minimise the impact on school funds.

5.2 Music tuition

The Local Authority operates a remission policy in relation to individual musical instrument tuition provided by the Herts Music Service.

5.3 Materials, books, instruments or equipment

The cost of materials for items that a child wishes to take home will be remitted for children whose parents are in receipt of any of the support payments listed in Paragraph 5.1. In addition, the Headteachers may, at their discretion, remit or subsidise charges for children of other parents who have explained genuine financial difficulties.

Remission of costs relating to books, instruments or equipment will be considered on a case-by-case basis.

6. Refunds

6.1 Illness

Where a pupil is unable to participate in an activity due to illness, the school will refund any marginal cost of the activity and, taking into consideration the overall cost of the trip, will consider making a full refund to the parents. Where a pupil drops out from an activity for any reason other than illness, it is at the discretion of the Headteacher whether a refund will be made.

6.2 Cancellation

In the event of the cancellation of an activity, visit or trip, the school will provide a full refund to parents.

⁴ The government plans to prescribe the circumstances when Universal Credit is fully rolled out.

6.3 Surplus

Where either a charge has been made or voluntary contributions received and the activity makes an unexpected surplus, the Crabtree Schools will offer a refund where the surplus is:

- 5% or more of the total cost, and
- £5 or more per person.

Surpluses will be reimbursed in 'round amounts' only, e.g. £6 not £6.29.

Any refunds should be made as soon as possible after the visit, either to pupils or parents by cheque or cash against signed receipts.

7. Monitoring and Review

This policy will be reviewed at least once every three years, in accordance with the Trust year planner.

The Resources Committee will undertake an annual review of the charges made and contributions sought under the terms of this policy.

The Resources Committee will monitor the impact of this policy by receiving on a termly basis (or annually if remission or help with charges is uncommon), 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.

Appendix 1: Examples of charging

| Chargeable activity or item | Notes |
|---|---|
| Materials, books, instruments, or equipment, <i>where a parent wishes their child to own them</i> | <p><i>For example:</i></p> <ul style="list-style-type: none"> • A clay model – a charge may be made to cover the cost of the clay. • Cookery club – a charge will be made to cover the cost of ingredients. |
| Music tuition | <p>The cost, or a proportion of the costs, for tuition provided by the Herts Music Service in playing a musical instrument or singing, where the tuition is an optional extra for an individual pupil or groups of up to four pupils.</p> <p>Tuition fees for lessons provided in school by other providers, e.g. Musicale Ltd and other independent teachers, are charged directly by the provider</p> |
| Clubs | <p>Clubs that are provided as optional extras (usually provided by external providers: for example, Game On, French, Spanish, Mad Science, Karate, Cookery etc.) will be chargeable direct from provider to parent, Parents of pupils in receipt of Pupil Premium or Pupil Premium Plus may apply to have the charges paid out of school funds.</p> |
| Board and lodging, for residential visits | <p>Board and lodging for Year 5 and Year 6 School Journeys will be charged at cost.</p> |
| Damage and Breakages | <p><i>For example:</i></p> <ul style="list-style-type: none"> • Lost library books will be charged at replacement cost. • In the case of wilful damage to school property or equipment by pupils, at the Headteacher's discretion, a charge may be made to the parents or a contribution requested towards replacement/repair. |

| Activities for which a Voluntary Contribution will be sought | |
|--|---|
| School trips, visits and workshops | <p>A voluntary contribution will be requested to cover the cost of an individual child's share of the costs of the activity. The schools will not seek to generate a surplus.</p> |
| Clubs/groups charged for by school (e.g. gardening club, year 5 & 6 spring term gym club) – these are optional extras, for which a charge may be made. | <p>This does not refer to other clubs held on school premises which, as per the table above, are charged direct from provider to parent.</p> |