

## Charging and Remission Policy

### Policy Monitoring, Evaluation and Review

This policy is effective for all academies within The Mead Educational Trust, the Teaching School, the SCITT and all other activities under the control of the Trust and reporting to the Trust Board.

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<b>Author:</b>	David Wyatt
<b>Ratified by:</b>	Board of Trustees-Finance/Audit and Risk Committee
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### Revision History:

Version	Date	Author	Summary of Changes:
V1.0	17.08.2015	DWY/SCA	Review of policy to reflect conversion to MAT
V2.0	21.09.2015	DWY/SCA	Review of roles
V3.0	24.09.2015	DWY/SCA	Amendment of Framework section, further ensuring business continuity.
V4.0	11.03.2016	DWY/CJO	Amendments to policy following meeting with Clear and Lane. Removal of Whistleblowing Policy; making Whistleblowing Policy a standalone document.
V5.0	22/08/2016	DWY	Policy update following release of AFH 2016; update of Procurement Policy; amendment of job titles. Revision of Charging and Remissions Policy.
V6.0	September 2017	DWY	New sections such as 'Forward' and extensive changes based on actual experience of operating as a Trust for almost two years
V7.0	September 2018	DWY	Change name and logo for the Trust Updated in line with AFH 2018 Removal of responsibilities for Deputy Chief Executive Officer (DCEO) Income section (P12) includes new funding formula Review of Virement Policy (P14) Improved definitions in the quotations section (P19/20) Improved definitions in the routine purchasing section (P24) Minor other changes
V8.0	September 2019	DWY	Updated in line with AFH2019

V9.0	January 2021	DWY	Updated in line with AFH2020. Removal of Charging and Remissions Policy and Procurement Policy to be standalone documents.
V10.0	September 2021	DWY	Minor changes
V11.0	September 2022	DWY	Expanded information in section 1 Added new section 3

## **Charging and Remission Policy**

### **1. Context and Aims**

A Charging and Remissions Overview is referenced in the Finance Policy, this policy provides additional detailed guidance.

The Mead Educational Trust aims to:

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

### **2. Introduction**

In accordance with the Education Reform Act of 1988 and sections 449-462 of the Education Act, 1996 no charges are to be made for any books, materials, equipment, or apparatus used during school hours.

The charging policy is applied in line with section 457 of the Education Act 1996 which e.g., allows charges to be made for residential school trips and artefacts made in school and taken home.

### **3. Voluntary contributions**

Where an Academy cannot levy charges and it is not possible to make these additional activities within the resources available to the Academy, the Academy may request or invite parents to contribute towards the cost of the trip or activity. Students will not be treated differently according to whether or not their parents have made any contribution in response to the request or invitation. Where there are not enough voluntary contributions to make the activity viable, then it will not take place.

No student will be disadvantaged because of family circumstances. A remissions policy will be applied. The charges may be remitted in part or full if deemed reasonable in individual circumstances.

#### 4. Refund of surplus money

Where, after the visit, there is a financial surplus that is equal to £3 or more per place, money should be shared evenly between the contributors, unless written agreement has been received to the contrary. Smaller balances will be retained and earmarked to support future trips and visits

#### 5. Specific examples of how the charging policy will be applied

Educational day visits:

- No charge will be levied in respect of day visits that take place during school hours and are part of the curriculum.
- Visits for curriculum enhancement can be charged.

Residential visits:

- For those which are essential to the National Curriculum, preparation for prescribed examinations a charge will be levied for Board, Lodging and transport.
- For those which are not essential to the National Curriculum, statutory RE, preparation for prescribed examination a charge will be levied for the full cost if the amount of school time is less than half of the total time of the trip. If the amount of school time is half or more of the total time of the trip, a charge will be levied to recover costs.

Remissions for residential visits

- In addition to pupils formally registered with Pupil Premium entitlement, parent/carers who can prove that they are in receipt of any of the following benefits will be exempt from paying the cost of board and lodgings on residential trips
  - Income Support
  - Income-based Jobseekers Allowance
  - Income related Employment and Support Allowance
  - Support under part VI of the Immigration and Asylum Act
  - The guaranteed element of Pension Credit
  - Child Tax Credit (providing that Working Tax Credit is not also received and the family's gross annual 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)

Examination Entries:

- A charge will be levied in respect of examination entries for students where the Academy has not prepared the student for the examination.
- A charge will be levied in respect of examination entries for students where the Academy has prepared the student for the examination and It considers that for educational reasons the student should not be entered and the student's parent/carer wishes the student to be entered (or the student him/herself when over 18 years old). In these circumstances, if the student subsequently passes the examination, the Academy will refund the cost.
- A charge will be levied where a student fails without good reason to complete the requirements of any public examination where the Academy paid or agreed to pay the entry fee.
- A charge will be levied for student re-sitting an examination

#### Materials and Textbooks:

- Where a student or parent/carer wishes to retain items produced because of art, craft and design, or design and technology, a charge may be levied for the cost of the materials.
- In the case of Food Technology, students usually provide their own ingredients, however if the student forgets, a charge can be levied if ingredients are provided.
- Textbooks are provided free of charge, however in some subjects, additional revision guides are made available, for which a charge is made.

#### Music Tuition:

- The cost of peripatetic tuition is subsidised by the Academy.
- No charge is levied where music tuition is an essential part of the National Curriculum, or a prescribed public examination syllabus followed by the pupil.
- Remission of RMS fees is available when parents receiving music tuition are in receipt of relevant benefits.

#### Out of School activities:

- No charge will be made for activities outside school hours that are part of the National Curriculum, or that form an essential part of the syllabus for an approved examination.
- If a student is prepared, outside school hours, for an examination that is not set out in regulations (the full list of which is available from the Academy), a charge will be levied for tuition and other costs.
- For all other activities outside school hours, a charge up to the cost of the activity will be levied.

#### Damage/Loss to property:

- A charge will be levied in respect of wilful damage, neglect or loss of Academy property (including premises, furniture, equipment, books or materials), the charge to be the cost of replacement or repair, or such lower cost as the principal may decide.

#### Expenses

- The academy will expect parents to cover any costs involved in interviews at universities, work experience travelling expenses etc. A small fund will exist to assist families on low-income levels. Application for such funding will be dealt with in the strictest confidence and any such application should be made direct to the principal.
- A charge will be levied in respect of wilful damage, neglect, or loss of property (including premises, furniture, equipment, books or materials) belonging to a third party, where the cost has been recharged to the Academy. The charge to be the cost of replacement or repair, or such lower cost as the principal may decide.

#### Sale of items

- Departments throughout the academy may purchase items in bulk and sell at cost to pupils, including examination revision materials. Each academy will ensure that all income taken for these sales is fully recorded and prepared for banking at the earliest opportunity.

#### Other charges

- The principal may levy charges for miscellaneous services up to the cost of providing such services e.g. copying a student's file.

## **6. Additional Funds**

The Academy welcomes extra funds raised by Parent Teacher Student Partnership groups and this income will be earmarked to purchase special items.

The Academies will make their facilities available to outside users at a charge of at least the cost of providing the facilities. Letting and hire of the Academies is conducted in line with each academy's individual Letting and Use Policy which includes a scale of charges.

## **7. Equal Opportunities**

Educational opportunities provided at TMET Academies during school hours are available to students regardless of ability to pay and that other activities are charged for in a fair and transparent way.