



THE ROSE LEARNING TRUST

CHARGES AND REMISSIONS POLICY TO BE AGREED AND PERSONALISED BY LGB

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SAMPLE

1 Introduction

This policy applies to charges made to parents/pupils, for facilities used by private individuals and third-party organisations that use the Rose Learning Trust facilities or premises.

This policy sets out what charges will be levied for activities, what remissions will be implemented and the circumstances under which voluntary contributions may be requested from parents/carers.

For Rose Learning Trust academies, the Head of Academy is responsible for the implementation of this policy.

2 Suggested Audience

All administration, teaching and support staff and parents/carers. As part of their Academy induction and professional development, relevant members of staff will participate in training which will enable them to apply the procedures and principles defined in this policy.

3 Aim

As a trust we aim:

- To make activities accessible to all pupils regardless of family income;
- To encourage and promote external activities which give added value to the curriculum;
- To respond to the wide variations in family income while not placing additional unexpected burdens on an Academy's budget

For the purposes of this document, 'Parent' is taken to include any parent, carer or person with parental responsibility for a pupil.

4 Activities for which charges cannot be made

The Trust recognises that legislation prohibits charges for the following in respect of registered pupils at its academies:

- Education provided during Academy hours (including the supply of any materials, books, instruments or other equipment).
- Education provided outside Academy hours, if it is part of the National Curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the academy, or part of religious education.
- Tuition for pupils learning to play musical instruments, if the tuition is required as part of the National Curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the Academy.
- Entry for a prescribed public examination, if the pupil has been prepared for it at the Academy.
- Education provided on any trip that takes place during Academy hours that is part of the National Curriculum or an examination course.
- Education provided on any trip that takes place outside Academy hours if it is part of the National Curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the academy, or part of religious education.
- Supply teachers to cover those teachers who are absent from the Academy accompanying pupils on National Curriculum or examination courses.

- Transporting registered pupils to or from the Academy premises, where in the past, the local education authority has had a statutory obligation to provide transport.
- Transporting registered pupils to other premises where the Education Advisory Body or in the past, the Local Education 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 Academy.

No charge shall be made in respect of admission to the academy unless it is for the purpose of: -

- Part time education for persons over compulsory school age.
- Full time education for persons over compulsory school age.
- Teacher training

5 Activities for which charges may be made

The Head of Academy may invite parents and others from time-to-time to make a voluntary contribution to the Academy's work, to allow the offer of activities or experiences which otherwise might not be possible.

In any request for voluntary payments it must be clear from the terms in which it is made that:

- There is no obligation to contribute.
- That pupils will not be treated differently according to whether their parents have contributed to the planned activity.
- That if there are insufficient contributions received to cover the cost of including all pupils who wish to participate, the activity will not go ahead.
- Where an activity takes place outside of academy hours and does not form part of the Curriculum or examination syllabus, this is classed as an optional extra and parents can be asked to meet the full cost of these activities

The Head of Academy may ask parents/carers to meet the costs of the activities detailed in the table below.

The charges will:

- be made after consultation with parents/carers;
- not exceed the cost of the provision;
- be set after an assessment of the profitability of any new activity and to ensure the recovery of overheads; and
- be proportional for each pupil.

Every effort will be made to ensure that all information defines costs and activities as simply and clearly as possible and is communicated well in advance, to enable families to plan for any charges.

Lessons / activities will not be confirmed until parental/carer agreement has been received. This must be by return of a signed reply slip

Activity	Note
Board and lodging on residential trips	Information about activities and costs to be distributed to parents/carers well in advance of any trip, to enable financial planning by the family to take place
The proportionate costs for any pupil on activities wholly or mainly outside Academy hours ('Optional extras') to meet the costs of: <ul style="list-style-type: none"> • Travel • Materials and equipment • Non-teaching staff costs • Entrance fees • Insurance costs 	Information about activities and costs to be distributed to parents/carers well in advance of any trip, to enable financial planning by the family to take place
Vocal and musical instrumental tuition	Charges to cover additional costs incurred by the Academy, beyond any element covered by public funding
Re-sits for public examinations where no further preparation has been provided by the Academy	
Examination fees where a pupil fails without good reason to sit an exam	After consultation with parents/carers
Any other education, transport or examinations where no further preparation has been provided by the academy	
Any other education, transport or examinations fee unless charges are specifically prohibited	
Breakages, repairs and replacements as a result of damage caused wilfully or negligently by the pupil	Charges may be made after consultation with parents/carers and will not exceed total replacement /repair costs
Extra-curricular activities and clubs	Charges to cover the additional costs incurred by the academy, beyond any element covered by public funding
Any extended Academy activity	Charges to cover the additional costs incurred by the academy, beyond any element covered by public funding
Damage/ vandalism / loss to and of Academy property or services	Charges may be made after consultation with parents/carers and will not exceed total replacement /repair costs
Replacement of any damaged parts caused by pupils setting off fire alarms for a prank	A charge may be made to a pupil who deliberately triggers the fire alarm knowing there to be no fire.

6 Remissions and refunds

As far as resources allow, the Academy will support pupils and their families to participate in the full range of activities which will be offered as part of the curricular and extra-curricular provision. This applies particularly to those pupils whose families receive support payments, such as those detailed below. While each case for support will be reviewed sympathetically, and in full confidence, the Academy itself has only limited resources at its disposal and will seek to use these resources prudently to affect the greatest number of its pupils.

Pupils whose parents/carers are in receipt of the following support payments will, in addition to having a free Academy lunch entitlement, also be entitled to apply to the Academy for some remission of charges for board and lodging costs during residential and other Academy trips.

The relevant support payments are:

- Income Support
- Income-based Jobseeker's Allowance
- Income-related Employment and Support Allowance
- Support under Part VI of the Immigration and Asylum Act 1999
- Guaranteed element of Pension Credit
- 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
- Universal Credit

All letters to parents/carers regarding activities which request a parental/carer contribution will include a statement inviting those parents/carers receiving any of the benefits above to contact the Academy in confidence if they would like their child / children to participate, giving details of the relevant benefit, so if necessary the Academy can confirm this.

7 Refunds

It is the Head of Academy's responsibility to ensure that all letters to parents in respect of educational visits make clear the elements of any payments requested from parents that are non-refundable and the terms and conditions that apply to any payments to be made to third party organisations.

Charges and contributions are set to cover the anticipated costs. If the income from an activity exceeds the actual costs, the Academy will refund any surplus of £5 or more per pupil who contributed to the activity.

Any surpluses will be used to support access to optional activities for those pupils whose families are experiencing financial hardship.

8 Voluntary Contributions

The Head of Academy may ask parents/carers for a voluntary contribution to support Academy activities.

The terms of any request made to parents/carers will specify that it is a voluntary contribution and in no way represents a charge. In addition, the following will be made clear to parents/carers:

- That the contributions is voluntary and a parent/carer is under no obligation to pay
- That pupils at the Academy will not be treated differently whether their parents/carers have made any contribution in response to the request
- The activity may not take place if insufficient contributions are made
The responsibility for determining the level of voluntary contribution will be delegated to the Academy's business manager under the direction of the Head of Academy.

9 Lettings

The Academy may make its facilities available to outside users and the community at a charge of at least the cost of providing the facilities. The scale of charges will be determined annually by the Head of Academy. Please refer to the Academy's Lettings Policy for further detail.

All potential Academy users will be made aware on application that they will be expected to use the Academy in accordance with the ethos of trust.

Charges will be levied for the use of the Trust's facilities by private individuals or external organisations at a rate to be determined annually by each Academy. Facilities will only be let where they are not needed for the purpose of education during that time and under no circumstances will lettings be subsidised from resources provided for the education of pupils.

Hirers will need to demonstrate that they have adequate insurance or provision for compensating the Trust for any damage they cause. They must also leave the facilities in a clean and tidy state, otherwise an additional fee for cleaning may be charged

10 Other charges

The Head of Academy, the Trust, the Academy Finance Committee or Education Advisory Body may levy charges for miscellaneous services up to the cost of providing such services e.g. for providing a copy of an OFSTED report or for responding to Freedom of Information requests.

11 Academy Meals

The Academy will determine and publish annually the price to be charged for Academy meals.

12 Monitoring and Review

The Rose Learning Trust Executive Leadership Team will review this policy annually and assess its implementation and effectiveness. A summary report of charges made under the policy will be provided to the Academy for distribution to LGB s and Trust staff.