

# Edison Primary School Charges, Voluntary Contributions, Remissions and Refunds





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## 1. Aims

Our school aims to:

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

## 2. Legislation and Guidance

This policy is based on advice from the Department for Education (DfE) on [charging for school activities](#) and [the Education Act 1996](#), sections 449-462 of which set out the law on charging for school activities in England. Academies are required to comply with this Act through their funding agreements.

This policy complies with our funding agreement and articles of association.

## 3. Definitions

- **Charge:** a fee payable for specifically defined activities
- **Remission:** the cancellation of a charge which would normally be payable

## 4. Roles and Responsibilities

We believe this policy should be a working document that is fit for purpose, represents the school ethos and enables consistency and quality across the school.

Our aims are:

- To outline what the school can and cannot charge for
- To outline the school policy for voluntary contributions and remissions
- To ensure compliance with all relevant legislation connected to this policy
- To work with other schools and the local authority to share good practice in order to improve this policy.

### 4.1 The Trust Board

The Trust Board has overall responsibility for approving the charging and remissions policy, but can delegate this to a committee, an individual governor or the Headteacher.

The Trust Board also has overall responsibility for monitoring the implementation of this policy.

Responsibility for approving the charging and remissions policy has been delegated to the Chair of the Finance Committee.

Monitoring the implementation of this policy has been delegated to the Finance Committee.

### 4.2 Headteachers

The Headteacher is responsible for ensuring staff are familiar with the charging and remissions policy, and that it is being applied consistently.



### 4.3 Staff

Staff are responsible for:

- Implementing the charging and remissions policy consistently
- Notifying the headteacher of any specific circumstances which they are unsure about or where they are not certain if the policy applies

The school will provide staff with appropriate training in relation to this policy and its implementation.

### 4.4 Parents

Parents are expected to notify staff or the headteacher of any concerns or queries regarding the charging and remissions policy.

## 5. Where Charges Cannot Be Made

Below we set out what we **cannot** charge for:

### 5.1 Education

- Admission applications
- Education provided during school hours (including the supply of any materials, books, instruments or other equipment), however please also see 6.2 Optional Extras
- Education provided outside school hours if it is part of:
  - The national curriculum
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the school (these do not include Statutory Assessment Tests)
  - 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, however please see 6.3 Music Tuition
- Entry for a prescribed public examination if the pupil has been prepared for it at the school

### 5.2 Transport

- Transporting registered pupils to or from the school premises, where the local authority has a statutory obligation to provide transport
- Transporting registered pupils to other premises where the Trust Board or local 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 school
- Transport provided in connection with an educational visit, however please see 6.2 Optional Extras



### 5.3 Residential Visits

- Education provided on any visit that takes place during school hours
- Education provided on any visit that takes place outside school hours if it is part of:
  - The national curriculum
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the school
  - Religious education
  - Supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential visit

## 6. Where Charges Can Be Made

Below we set out what we **can** charge for:

### 6.1 Education

- Any materials, books, instruments or equipment, where the child's parent wishes him or her to own them
- Optional extras (see section 6.2)
- Music and vocal tuition, in limited circumstances (see section 6.3)
- Certain early years provision
- Community facilities
- Residential board and lodging fees for an educational visit
- Breakfast and After School Club
- Tea and supervised homework sessions.

### 6.2 Optional Extras

We are able to charge for activities known as 'optional extras'. In these cases, schools can charge for providing materials, books, instruments or equipment. The following are optional extras:

- Education provided outside of school time that is not part of:
  - The national curriculum
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the school
  - Religious education
- Examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school



- Transport (other than transport that is required to take the pupil to school or to other premises where the local authority or Trust Board has arranged for the pupil to be provided with education)
- Board and lodging for a pupil on a residential visit
- Extended day services offered to pupils (such as breakfast clubs, after-school clubs, tea and supervised homework sessions)

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
- The cost of buildings and accommodation
- Non-teaching staff
- Teaching staff engaged under contracts for services purely to provide an optional extra (including supply teachers engaged specifically to provide the optional extra)
- 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 will not be greater than the actual cost of providing the optional extra activity, divided equally by the number of pupils participating.

Any charge will not include an element of subsidy for any other pupils who wish to take part in the activity but whose parents are unwilling or unable to pay the full charge.

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.

Parental agreement is necessary for the provision of an optional extra which is to be charged for.

### **6.3 Music Tuition**

Schools can charge for vocal or instrumental tuition provided either individually or to groups of pupils, 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 giving the tuition.

Charges cannot be made:

- If the teaching is an essential part of the national curriculum
- If the teaching is provided under the first access to the Key Stage 2 instrumental and vocal tuition programme
- For a pupil who is looked after by a local authority

### **6.4 Residential Visits**

We can charge for board and lodging on residential visits, but the charge must not exceed the actual cost.



## 7. Contributions

As an exception to the requirements set out in section 5 of this policy, the school is able to ask for contributions from parents to fund activities during school hours which would not otherwise be possible.

Throughout the year, there are likely to be day visits organised for classes in conjunction with their topic work, or visits to the school by theatres, workshops, etc. Such activities play an important part in the school curriculum, extending the learning that is started in the classroom and, in some circumstances, leading to a clearer understanding of the work being studied.

Wherever it is possible, activities will be paid for wholly or partly by school funds. However, for activities to go ahead it will often be necessary to ask parents to make voluntary contributions towards the cost of these.

Should a parent decide not to contribute the amount requested, the law states that the child should still be entitled to take part in the activity. In reality, however, many visits and activities would not be able to go ahead if the significant majority of parents decided not to contribute. For larger contributions, there will always be provision to pay by instalments. If paying for visits and other activities causes problems, parents are encouraged to approach the school.

Parents will usually be invited to make a contribution for the following:

- Trips and visits (this may sometimes include board and lodging)
- Costs of extra-curricular activities, where they are provided externally or where they incur costs (eg transport, sports kits, equipment)
- Costs of visiting companies, presenters, theatre groups, etc for the purpose of curriculum enrichment. The terms of any request made to parents will specify that the request for a voluntary contribution does not represent a charge.
- Transport
- Hire of facilities
- Entrance fees/tickets
- Purchasing materials and equipment for an activity
- Insurance
- Fundraising
- Donations
- Sponsorship

It will be made clear to parents that assistance is available if a child is entitled to free school meals. The responsibility for determining the level of voluntary contribution in such cases is delegated to the Headteacher. Pupils at the school will not be treated differently according to whether their parents have made any contribution in response to the request.

It will be stated that, if sufficient funds are not generated to support the activity, it may not go ahead. This will be implemented by the school if necessary.



## 8. Activities We Charge For

The school will charge for the following activities:

- Clubs, including Breakfast and After School Clubs
- Dinner Money
- Community Events and Lettings

For regular activities, the charges for each activity will be determined by the governing body and reviewed in September each year. Parents will be informed of the charges for the coming year in September each year.

We reserve the right to request payment in the case of loss or damage to school property.

## 9. Remissions

In some circumstances the school may not charge for items or activities set out in sections 6 and 8 of this policy. This will be at the discretion of the Trust Board and will depend on the activity in question.

### 9.1 Remissions For Residential Visits

Parents who can prove they are in receipt of any of the following benefits will be exempt from paying the cost of board and lodging for residential visits:

- Income Support
- Income-based Jobseeker's Allowance
- Income-related Employment and Support Allowance
- Support under part VI of the Immigration and Asylum Act 1999
- The guaranteed element of Pension Credit
- Child Tax Credit (provided that Working Tax Credit is not also received and the family's annual gross 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)

## 10. Monitoring Arrangements

The Headteacher monitors charges and remissions, and ensures these comply with this policy.

This policy will be reviewed by the Headteacher every year.

At every review, the policy will be approved by the Trust Board. (Last approved November 2024)