

Charging and Remissions Policy

Adopted by the Board of Trustees

Date of approval: 15 July 2020

Reviewed by: I Jephson and R Aitken

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1. INTRODUCTION

Trustees recognise the valuable contribution that a wide range of activities, including Academy visits, residential experiences and clubs, can make towards all aspects of students' education. Trustees therefore wish to actively promote and provide as far as possible such activities as part of a broad and balanced curriculum for the benefit of all students of the Academies within The Evolve Trust. However, the Trustees reserve the right to refuse letting facilities if they so wish.

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.

2. GENERAL DATA PROTECTION REGULATIONS (GDPR)

This policy has been reviewed in accordance with the General Data Protection Regulation (GDPR) which will replace the Data Protection Act 1998 from 25th May 2018. The introduction of GDPR has resulted in changes to many existing data protection rules and regulations that educational establishments adhere to. The Evolve Trust has undertaken a full data protection audit and have ensured that appropriate changes that have been made to data protection rules and regulations have been adhered to in full. The Evolve Trust has carried out all additional compliance requirements and fully accepts their duty of care to ensure individuals' data is kept safe and secure, resulting in increased compliance in our systems, processes and policies.



3. ROLES AND RESPONSIBILITIES

3.1 The Board of Trustees

The Board of Trustees have overall responsibility for approving the charging and remissions policy, but can delegate this to a committee.

The Board of Trustees also have the overall responsibility for monitoring the implementation of this policy.

The responsibility for the above has been delegated to the Business, Finance and Estates Scrutiny Board.

3.2 Headteachers

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

3.3 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.

3.4 Parents

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

4. CHARGES

A charge is a fee payable for specifically defined activities.

Below we set out what we cannot charge for:

Education

- Admission applications
- Education provided during school hours (including the supply of any materials, books, instruments or other equipment)
- Instrumental or vocal tuition, for pupils learning individually or in groups, unless the tuition is provided at the request of the pupil's parent
- Entry for a prescribed public examination if the pupil has been prepared for it at the school
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school
- 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
 - Religious education

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 governing 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

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

Below we set out what we can charge for:

Education

- Any materials, books, instruments or equipment, where the child's parent wishes him or her to own them
- Optional extras (see below)
- Music and vocal tuition, in limited circumstances
- Certain early years provision
- Community facilities

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:

- 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 governing 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)
- 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

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.

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

Residential visits

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

4 REMISSIONS

Remission is the cancellation of a charge which would normally be payable.

In some circumstances the Trust may not charge for items or activities set out above. This will be at the discretion of the Trust and will depend on the activity in question.

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)

Any other remission arrangements for a particular activity or student will be entirely at the discretion of Trustees. Any subsidy provided by Trustees will be met from the funds at its disposal.

5 VOLUNTARY CONTRIBUTIONS

Nothing in this policy statement precludes Trustees from inviting parents/carers to make voluntary contributions for the benefit of the Academies or in support of any Academy activity, whether during or outside Academy hours. Any contributions sought will be entirely voluntary and students will not be treated differently according to whether or not their parents/carers make a contribution in response to any invitation.

If an activity cannot take place without voluntary contributions, this should be made clear to parents/carers in the initial letter. The letter could indicate the contribution per student which would be required if the trip were to take place. However, the letter could make it clear that the activity would not take place if insufficient parents were able to support it.

There is no limit to the level of voluntary contribution which parents/carers can make towards Academy activities.

6 BREAKAGES AND DAMAGE TO ACADEMY PROPERTY

Trustees reserve the right to seek reparation from parents where their children cause breakages or damage to Trust property. This will be at replacement value.

7 LETTINGS

Trustees control the use of the Trust premises both during and outside academy hours. Trustees regard the Trust buildings and grounds as a community asset and will make every effort to enable them to be available for the delivery of extended services including community use.

Definition of a Letting

A letting may be defined as “any use of the Trust premises (buildings and grounds) by either a community group (such as a local music group or football team), or a commercial organisation (such as the local branch of ‘Weight Watchers)’”.

A letting must not interfere with the primary activity of the Trust, which is to provide a high standard teaching and learning environment for all its students.

Charges for a Letting

Trustees are responsible for setting charges for the letting of the Trust premises. A charge may be levied in order to cover the following:

- Cost of services (heating and lighting);
- Cost of staffing (additional security, caretaking and cleaning) – including “on-costs”;
- Cost of administration;
- Cost of “wear and tear”;
- Cost of insurance (if the Trust has arranged its own public liability insurance);
- Cost of use of Trust equipment (if applicable);
- Profit element (if appropriate).

The specific charge levied for each letting will be reviewed no less than annually by Trustees. This review will preferably take place during the summer term for implementation from the beginning of the next financial year, with effect from 1st September of that year. Current charges will be provided in advance of any letting being agreed.

Trustees have the right to refuse an application – no letting should be regarded as “booked” until approval has been given in writing. Once a letting has been approved by (or on behalf of) Trustees, a letter of confirmation will be sent to the Hirer outlining terms and conditions of hire.

All lettings fees, which are received by the academies, will be paid into the bank account, in order to offset the costs of services, staffing etc. (which are funded from the academies’ delegated budgets). Income and expenditure associated with lettings will be regularly monitored and reported to Trustees.

The Evolve Trust is registered for VAT and is required to charge VAT on lettings unless exempt according to specific HMRC legislation.

Management and Administration of Lettings:

The Chief Executive Officer is responsible for the management of lettings, in accordance with the Trusts' Charging & Remissions Policy. The Chief Executive Officer may delegate all or part of this responsibility to other members of staff whilst still retaining overall responsibility for the lettings process. The Trust currently uses the services of Field Sports Management to administer the sports lettings at the Brunts Academy.

If the Chief Executive Officer has any concern about whether a particular request for a letting is appropriate or not, they will consult with the Chair of Trustees or Chair of the Audit Committee, which has been given delegated authority to determine the issue on behalf of the Full Board of Trustees.

We are required by HMRC to retain a copy of all sales invoices and signed contracts relating to lettings for a period of 6 years from the end of the financial year. This invoice may include personal information such as name and contact details for the purpose of providing an audit trail for such transactions. We will ensure that any such information is secured in line with the Trust's Data Security Policy which can be found on the Evolve Trust website.

8 POLICY REVIEW

The Evolve Trust Trustees reserve the right to review and amend this policy statement from time to time as appropriate.

Template for self-assessment and action planning: Equality Act 2010 (Amendment Order 2012)

Name of Policy:	Charging and Remissions Policy
Date Analysis Undertaken:	July 2020

General Duty	Current Provision	Task to be completed / Undertaken	Support needed / Date for action / Lead
Eliminate unlawful discrimination, victimisation and harassment and other prohibited conduct.	Policy currently in place in line with Department for Education guidance	Review policy as determined by Trustees. Ensure any changes to legislation are incorporated into the Policy and actioned within the Trust	On-going: BAS
Advance equality of opportunity between people who share a protected characteristic and those who do not	Policy neutral impact, all employees receive support and any reasonable adjustments made when necessary	Seek professional support and advice as and when necessary. Review Policy as determined by Trustees	On-going: BAS
Foster good relations between people who share a protected characteristic and those who do not	Policy neutral impact, all employees receive support and any reasonable adjustments made when necessary	Seek professional support and advice as and when necessary. Review Policy as determined by Trustees	On-going: BAS

Template for self-assessment and action planning:

Equality Act 2010 (Amendment Order 2012)

Protected Characteristic	Positive Impact	Negative Impact	Neutral Impact	Engagement undertaken	Evidence and action taken/Outcome
Race			✓		
Religion or Belief			✓		
Gender / Gender Reassignment			✓		
Sexual Orientation			✓		
Disability			✓		
Age			✓		
Other (please specify)			Students entitled to Remissions – in line with Government guidelines		
Summary: All trips visits individually assessed at the time of initial costing to allow for protected characteristics. Reasonable adjustments implemented as necessary.					

Undertaken by:	Barbara Sims
Date:	July 2020