

CHARGING AND REMISSIONS POLICY STATEMENT (Nov 2021)

1. Introduction

- 1.1 It is the policy of the trustees (“Trustees”) of the Hinchley Wood Learning Partnership (the “Trust”) that the core education provided to all students attending Schools (each a “School”) within the Trust, is free. However, each School attempts to provide a much wider range of activities (“Activities”) for students than it is required to do so under regulation or it is able to meet from its own financial resources. This policy sets out, in broad terms, which are these extra Activities and how the School funds them.
- 1.2 It is the statutory responsibility of the Trustees to establish the policy of (i) when Schools can charge and when they cannot charge for student Activities, and of (ii) providing for remission of such charges in appropriate circumstances.
- 1.3 This policy also covers student Activities where it is not appropriate to charge but rather the School needs to request Parental Contributions in order to allow the Activity to take place.
- 1.4 A copy of this policy statement should be included on the School’s website.
- 1.5 The policy meets the requirements of Sections 449 to 462 of the Education Act 1996, as amended.
- 1.6 For the purposes of this policy the following terms are used:
 - “Essential Curriculum Activities” meaning Activities and resources required for the delivery of the School’s curriculum and occurring normally in School Time.
 - “Beneficial Curriculum Activities” meaning Activities and resources which would be beneficial but not essential for the delivery of the School’s curriculum and which normally, but not exclusively, occur outside School time.
 - “Optional Non-Curriculum Activities” meaning Activities and resources used to benefit a student’s wider enrichment but which are not required as part of the School’s curriculum. These Activities would normally occur outside School time.
 - “School Time” – meaning the hours of opening for a normal School day in each School
 - Parent means parent / carer of a student at the School.
 - Making a charge – the School will get a written commitment from a Parent to a charge for an Activity and this will constitute a formal agreement between School and Parent.
 - Requesting a voluntary Contribution (“Contribution”) – the School will get a written commitment from a Parent to making a Contribution and will expect the commitment to be honoured.

- In both these cases the School reserves the right to take future action to recover the agreed sum. It is unlikely, but not excluded, that this may result in legal action but may well require payment before any further Activity is undertaken.

2. Relationship to other School policies

- 2.1 The policy needs to be read in conjunction with the School's Equality Strategy and the Curriculum and Teaching & Learning Policy.

3. General Principles to be followed:

- 3.1 The School will not charge for Essential Curriculum Activities. All appropriate students must have the opportunity to take part in the Activity. At the School's discretion a Contribution may be requested from Parents.
- 3.2 The School will not usually charge for Beneficial Curriculum Activities but given the School's limited financial resources the School will ask Parents for Contributions, and if there is insufficient support the School will probably have to cancel the Activity and reserves the right to do so.
- 3.3 The School will charge for optional non-curriculum Activities. The School will not provide any remission for students on such trips e.g. Ski trips.
- 3.4 Where the School is charging for an Activity the cost of non-teaching staff may be included. The cost of supply teachers to cover the students who choose not to take part in the Activity will not be included in the cost of the Activity.
- 3.5 Where the School is asking for a Contribution the cost of supply teachers will be included in the overall cost.
- 3.6 The AO or an appointed designate, shall be the final arbiter of the category of an Activity.

4. General Interpretation of Principles

- 4.1 The School **will not charge** for admissions to the School.
- 4.2 The School **will not charge** for the cost of Essential Curriculum Activities provided wholly or partly during School Time or for books required as part of the curriculum – for example there will be no charge for the costs associated with practical subjects where materials, or other equipment is required. The School **will ask for Contributions** where using materials would be beneficial but not essential.
- 4.3 The School **will charge** for books (for example revision guides or art sketch books) or other equipment which are beneficial to the student or their course work but not essential.
- 4.4 The School **will charge** (or request they are supplied by Parents) for ingredients used in Food Technology where the results are consumed by the students or their families.
- 4.5 The School **will not charge** for the cost of transport to other education sites when a curriculum Activity requires transport.

- 4.6 The School **may charge** for the running costs of one of the School's mini buses, for example in circumstances where a minibus is being used for an extra-curricular Activity.
- 4.7 The School **may charge** for board and lodging on residential visits even if it is an Essential Curriculum Activity.
- 4.8 The School **will not charge** for musical tuition where it is part of curriculum Activities and takes place during School Time (i.e. instruments taught in class).
- 4.9 The School **will charge** for musical tuition which does not fall within curriculum Activities and for exams related to instruments (for example Associated Board of the Royal School of Music).
- 4.10 The School **will not charge** for fees relating to public examinations which are part of the curriculum but will charge for any re-sits requested by Parents.
- 4.11 The School **will charge** for re-scrutiny of exam papers when requested by Parents.
- 4.12 The School reserves the right to charge for examination fees where the student fails without good reason to complete the examination requirements.
- 4.13 The School **will not charge** for fees relating to finding and assessing work experience opportunities.
- 4.14 Where an Activity occurs mainly during School Time and is organised by a third party (i.e. not the School) (and Parents have asked for and the AO has agreed to a leave of absence for the student) **a charge may be made** to Parents by that third party (independent of the School).
- 4.15 In order for decisions about the financial viability of an Activity to be made it must be planned sufficiently early so that Parents have time to make a financial commitment prior to the School entering into any contractual arrangements with its providers.

5 Calculating and accounting for charges and Contributions

When an Activity is planned, where it is appropriate to make a charge to Parents, or to ask for Contributions from Parents, the following will apply:

- 5.1 A best estimate of the total cost of the Activity must be calculated in advance. The total will include all third party costs to be incurred, the cost of any staff cover during the Activity (include teaching staff cover only if asking for a Contribution) and a 5% allowance for administrative costs associated with the Activity. As it is desirable to cover the costs, making a small surplus (but no more than 5% of total costs) is acceptable. A standard spreadsheet is provided to facilitate this exercise.
- 5.2 Any such surpluses will be used by the School as set out in 7.1 below.
- 5.3 The total estimated cost is then divided by the number of estimated students on the Activity to arrive at a cost per student.

- 5.4 The exception is a Curriculum Activity where board and lodging on a residential visit is being charged. Here the amount to be charged may not be more than the cost of the board and lodging for that individual student.
- 5.5 Where an Activity will require the organiser to incur small expenses (for example cokes and hamburgers whilst away from the main accommodation) it is acceptable for the organiser to draw down cash or to use a School currency card (if overseas) to cover such expenses – as long as the estimated amount per student per day is clearly set out in the initial financial budget.
- 5.6 Parents will be informed in written format (whether hard copy or electronic) that (i) an Activity is planned, (ii) whether the Activity is judged to be essential, beneficial or optional, (iii) whether they are being charged for participation, or (iv) a Contribution is requested. Their attention drawn to the following matters:
- The student will not be considered for the Activity until and unless a positive reply (via Parent Pay or on the appropriate slip) is received by the School.
 - There is a trip reply deadline
 - A positive reply constitutes an agreement with the School and if a charge was agreed then any unpaid monies will remain a debt to the School.
 - Refunds, for whatever reason, will be entirely at the discretion of the School.
 - Payment by Parent Pay is encouraged. Any payment by cash will be entirely at the risk of the Parent. Receipts for cash are not given unless requested in person.
 - The stated cost is an estimate and a refund will only be made if a surplus is the higher of £10 per student or more than 5% of the cost of the Activity.
 - The estimated costs are based on the number of pupils applying and the Activity may be cancelled if this number is not reached.
 - The Activity requires an agreed level of Contributions to be made and may be cancelled if that amount is not forthcoming.
 - The detail of the estimated costing is available for inspection upon request to the Finance Office.

Further examples of when charges will be made:

- Locker keys
- Deposits for text books
- Lost smartcards
- Breakages around the School (windows etc.)
- Uniform
- Food bought in the canteen or snack shack
- After School Activities
- Photographs
- Year books
- Plays
- Concerts

6 Remission of Charges

- 6.1 The Trust wants to ensure, as far as possible, that Activities are open to all students regardless of financial circumstances. A note to this effect will be included in all trip / Activity letters sent to Parents. Parents who are in receipt of the following benefits should apply through the

School for Free School Meals. Students on the Pupil Premium list (qualification, for example, being eligible for FSMs at any time in last 6 years) will be eligible for a remission against charges or requests for Contributions. FSM eligibility applies if either a Parent or their partner receives one of the following:

- Income-based New Style Jobseeker's Allowance
- Income related Employment and Support Allowance
- Any support under part VI of the Immigrations and Asylum Act 1999
- Child Tax Credit provided you're not also entitled to Tax Credit and have an annual income of £16,190 or less, as assessed by HMRC.
- Universal Credits to the extent they replace any of the benefits / credits immediately above
- The Guarantee element of State Pension Credit

6.2 In addition to the categories set out in 6.1 above the School will also consider making a Contribution to cover some of the charge or Contribution for certain other Parents (for example where there are 3 or more family members in the School) or where a Parent has recently been made redundant or suffered the bereavement of a partner. In addition, the School will allow Parents to make a smaller Contribution to a Beneficial Curriculum Activity where the circumstances above exist.

6.3 It is the responsibility of the Parent to claim such remission of charges on an Activity-by-Activity basis.

6.4 It is unlikely that any remission will be made for Optional Non-Curriculum Activities but any request will be dealt with on an individual basis.

7 Activity Deficit / Surpluses / Remission Account

7.1 The above will result in some Activities making a deficit (unexpected late charges for example) but in the main Activities will break even or make a small surplus. In those circumstances the surplus will be set against any School Contributions for pupils and any deficits incurred on other Activities. Once complete the Activity balance will be accounted for within the School's total accounts.

8. Monitoring

8.1 A designated member of the Finance and Resources Committee will provide a brief report for review by the F&R Committee each year.

8.2 Any exceptions to this policy will be brought to the attention of the next meeting of the Finance & Resources Committee.

Approved by Trustees: **07 October 2021**

Last review date: **October 2021**

Next review: **October 2022**