



THE CONSORTIUM  
ACADEMY TRUST

---

Shaping Positive Futures

# Charging & Remissions Policy

The Consortium Academy Trust  
An Exempt Charity Limited by Guarantee  
Company Number 07665828

Status:	Live
Policy Owner (position)	Director of Finance
Statutory / Recommended	Statutory
Date Adopted	14 May 2018
Review Period	24 months
Last Review Date	January 2023
Revision	2
Next Review Date	January 2024
Advisory Committee	Finance, People & Resources Committee
Linked Documents and Policies	Financial Regulations

This Policy shall be reviewed in accordance with the above review date or earlier should there be a legal requirement, business requirement or any collective agreement that necessitates a change.

## **1.0 Introduction**

- The Consortium Academy Trust (The Trust) is required by the Education Act 1996 to set out its policy for charging for academy activities. Education provided during academy hours must be free – the definition of education includes materials, equipment and transport provided in academy hours by the Trust to carry learners between their academy and an activity.
- The Trust recognises the valuable contribution that the wide range of additional activities, including sports, clubs, societies, music trips and residential visits can make towards learners' education. The Trust aims to promote and provide such activities both as part of a broad and balanced curriculum and as additional optional activities.

## **2.0 Purpose**

- The purpose of this policy is to set out where charges will and will not be raised by the Trust. The policy also explains the criteria for qualifying for remission from charges and the process for applying for remission.

## **3.0 Legal Framework**

- This policy will have consideration for, and be compliant with, the following legislation and statutory guidance:
  - Education Act 1996
  - The Charges for Music Tuition (England) Regulations 2007
  - The Education (Prescribed Public Examinations) (England) Regulations 2010
  - Freedom of Information Act 2000
  - DfE (2018) 'Charging for school activities'
  - DfE (2020) 'Governance Handbook'
  - The Trust's Funding Agreement
  - ESFA (2022) 'Academy Trust Handbook'

## **4.0 Summary of Charges**

- **Charges will not be made for:**
  - admission applications.
  - education provided during academy hours.
  - education provided outside academy hours if it is part of the national curriculum, part of a syllabus for a prescribed public examination that the learner is being prepared for by a Trust academy, or part of religious education.
  - entrance fees for prescribed examinations, where the learner is being formally prepared by a Trust academy.
  - examination resits, if the learner is being prepared for the resits at a Trust academy.
  - an exam result appeal, where there are a large number of candidates with results that are unsatisfactory in a specific subject, and the Headteacher supports the request.

- **Charges will be made for:**
  - optional extra activities which take place wholly or mainly outside academy hours (i.e. at least 50% outside academy hours) and which are based on parental choice.
  - music tuition for which there is a parental agreement and where it does not form part of the curriculum or part of the syllabus for a prescribed examination.
  - wilful damage to Trust property, equipment or furniture.
  - lost or damaged textbooks, exercise books or planners.
  - ingredients and materials for subjects such as Design & Technology and Food Technology where parents/carers have indicated a wish to own the finished product.
  - the recovery of examination fees where the learner fails, without good reason/ medical certificate, to complete the examination requirements for any public examination for which the academy has paid an entry fee.
  - examination entries where there is a request from the parent/carer for additional subject entries to be made which are not supported by the academy.
  - resits for A Levels or BTEC unit tests.
  - individual exam result appeals to the Exam Board based on parental requests where the appeal is not supported by the academy – payment must be made before the appeal is lodged.
  - board and lodgings on residential visits.
  - extended day services offered to pupils, e.g. breakfast or out-of-school provision

## 5.0 Detail of Charges

- **Provision of education**

No charge shall be made in relation to the education of registered learners where education is provided during academy hours. Where education is provided outside of academy hours, no charge will be made provided the activity is required as part of the syllabus/curriculum.

- **Visits during the academy day**

A voluntary charge may be made to cover the cost of educational visits and other activities. However, the charges cannot be enforced where this forms part of the curriculum. Where the level of non-payment makes a trip financially unviable, the trip will be cancelled.

- **Optional extra activities**

Visits and activities that take place outside of the academy day or as part of an extra-curricular activity can be charged in full.

- **Musical instrument tuition**

Music tuition is the only exception to the rule that all education provided during school hours must be free. The Charges for Music Education (England) Regulations 2007 allow for charges to be made for vocal or instrumental tuition provided either individually or to groups of any size, provided that the tuition is at the request of the learner's parents/carers.

Each academy will charge for music tuition, either individually or part of a group, where the lesson is not considered to be part of the curriculum and is at the request of parents/carers,

even if the lesson takes place during academy hours. The amount charged is determined by the cost to the academy of providing the tuition. The charge will not exceed the actual cost.

- **Practical subject charge**

Voluntary contributions will be requested to cover the cost of materials and ingredients in practical subjects where parents/carers indicate that they wish to receive the finished article. Parents/carers and learners will be informed in advance of the lessons of the costs involved. Where parents/carers do not wish to make such a contribution, the product produced by the learner will be recycled, i.e. the learner will not be able to take the product home.

- **Residential visits**

Where a visit has taken place during the academy day (at least 50% of the trip) or it is part of the required curriculum, no charge for the education provided and the travel costs can be made. The Trust can, however, charge for the cost of board and lodgings. The charge passed onto parents/carers cannot exceed actual cost.

Where a visit has taken place outside of the academy day (at least 50% of the trip) and where the work undertaken is not an integral part of the examination course / curriculum, the trip is classed as optional and parents/carers will be expected to meet the full costs of the trip.

Charges for these trips will include, but are not limited to:

- travel costs
- board and lodgings
- materials, books, instruments and other equipment
- administration costs incurred in arranging the visit
- supply teachers to cover for teachers accompanying pupils during the visit
- insurance costs
- entrance fees
- activity fees

The school may charge for board and lodging, but the charge will not exceed the actual cost. Parents will be exempt from board and lodging costs if they can prove that they are in receipt of one or more of the following benefits:

- 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 they are 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 four weeks after they stop qualifying for Working Tax Credit
- universal credit – if they apply on or after 1 April 2018, their household income must be less than £7,400 a year (after tax and not including any benefits they receive)

- **Public examinations**

No charge will be made in respect of the entry of a registered learner at an academy for an examination for which the academy agrees the learner should be entered.

Charges will be applied for the entry of a learner for an examination for which they have not been prepared by the academy, or for entry to an examination against the advice of the academy.

Where a learner fails to sit an examination for which they have been entered without good reason/ ill health, parents/carers will be expected to meet the cost of the examination entry.

Parents/carers seeking to have an examination paper remarked, where the remark is not supported by the academy, will be required to pay the remark fee prior to the remark being requested. If the new grade exceeds the original grade then this fee will be refunded as no charge will be levied by the examination board.

- **Loss of / damage to property**

Parents/carers will be expected to meet the cost of repairing or replacing any Trust property damaged or destroyed by a learner or their parents, or any fines to be paid by the Trust as a result of the actions of a learner. A charge will also apply for loss of or damage to Trust property (including books and equipment) placed under the care of the learner.

- **Fundraising and sponsorship**

General fundraising and sponsorship from a variety of sources may be used to allow additional activities to take place. Any fundraising activity will make the purpose of the fundraising clear to those who may wish to contribute.

- **Private lettings**

Charges will be made for the use of the Trust's facilities by private individuals or external organisations at a rate to be determined annually by the Trust. Facilities will only be let when they are not needed for the purpose of education during that time.

## **6.0 Voluntary contributions**

- Voluntary contributions may be requested for any activity, whether during or outside academy hours, residential or non-residential. Learners whose parent/carer is unable to contribute will not be prevented from participating in an activity that takes place during academy time if the activity goes ahead.
- In any request for voluntary payments it must be clear from the terms in which it is made that:
  - there is no obligation to make a contribution
  - learners will not be treated differently according to whether or not their parent/carer contributed to the planned activity
  - if there are insufficient contributions received to cover the cost of including all learners 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/carers can be asked to meet the full cost of these activities.

## **7.0 Remission of charges**

- In order to remove financial barriers from disadvantaged learners, the Trust has determined that some activities and visits where charges can legally be made may be offered at no charge or a reduced charge to parents/carers in particular circumstances.

- **Qualifying for applying for remission of charges**

Learners in receipt of Free School Meals or where the academy is in receipt of Pupil Premium Grant for that learner may apply for remission of charges.

Parents/carers may also apply for remission of charges if they are in receipt of the following benefits:

- 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 State Pension Credit
- Child Tax Credit (provided not also in receipt of Working Tax Credit and have an annual gross income of no more than £16,190)
- Working Tax Credit run-on – paid for four weeks after ceasing to qualify for Working Tax Credit
- Universal Credit – if applied on or after 1 April 2018, household income must be less than £7,400 per annum after tax and not including any benefits received.

- **Compulsory activities & visits taking place during academy hours**

Where parents/carers are in receipt of any of the benefits listed in 7.2.2, the Trust will observe its statutory duty to remit in full the cost of board and lodgings for any residential activity deemed to take place within academy hours.

- **Optional extras**

Application for remission from charges for optional extras will be considered for learners who qualify under the guidelines set out in 7.2.

Parents/carers meeting these criteria may apply in confidence to the Headteacher at the learner's academy for the remission of such charges.

Success of applications for remission of charges will depend upon the parents/carers fulfilling the criteria and the availability of funding within the academy.

- **Other hardship cases**

Parents/carers who do not qualify for applying for remission of charges under the guidelines set out in 7.2 may also apply for remission of charges in the following cases:

- specific circumstances have caused temporary hardship
- recently moved into hardship but not yet receiving the benefits listed in 7.2.2
- any other justifiable reason.

Parents/carers may apply in confidence to the Headteacher at the learner's academy.

Applications will be considered on a case-by-case basis by the Headteacher in conjunction with the Finance Business Partner.

## **8.0 School trip refunds**

- All initial deposits for school trips will be non-refundable. Parents/carers will be informed of this when they are provided with initial information about the trip. However, see 8.2 below if the academy has to cancel a trip.
- In the event that an academy has to cancel a trip due to foreseen circumstances, parental contributions will be refunded (including the deposit).
- In the event that a trip is cancelled due to unforeseen circumstances, the decision whether to refund parents/carers will be made by the Director of Finance on a case-by-case basis, taking into account the circumstances of the cancellation and the cost to the academy.
- In the event that a trip is postponed due to unforeseen circumstances, monies paid will be carried forward until the trip takes place. Parents/carers who do not wish their child to take part in the re-arranged trip will be eligible for a refund, excluding the initial deposit.
- In the event that a learner or their parents/carers cancel their place on a trip, or a learner cannot attend a trip at short notice (e.g. due to illness) it is at the discretion of the Director of Finance as to whether a refund is given, taking into account the reason for cancellation, whether the academy will be reimbursed for the learner's place on the trip and whether the place can be offered to another learner.
- Where a learner or their parents/carers have previously cancelled a place on a trip, the academy has the right to refuse the learner to attend future trips and visits.
- Once trip arrangements have been booked and confirmed, if contributions exceed the total cost of the trip, a refund will be given where the excess is greater than £5 per pupil. If the excess is less than £5 per pupil, this will be paid into the academy's school fund account.
- Excess expenditure will be subsidised by the school fund.