



The Black Pear Trust

CHARGING AND REMISSIONS POLICY

REVIEWED BY: Finance, Risk and Resources Committee	October 2024
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APPROVED BY: Finance, Risk and Resources Committee	October 2024
NEXT REVIEW DUE BY: October 2025	

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STATEMENT OF INTENT

The Black Pear Trust is committed to ensuring equal opportunities for all pupils, regardless of financial circumstances, and has established the following policy and procedures to ensure that no child is discriminated against by our offering of school trips, activities and educational extras.

In addition, we are committed to adhering to legal requirements regarding charging for school activities, and meeting all statutory guidance provided by the DfE.

We promise:

- Not to charge for education provided during school hours.
- To inform parents on low incomes and in receipt of relevant benefits of the support available to them when asking for contributions.

Legal framework

1.1. This policy will have consideration for, and be compliant with, the following legislation and statutory guidance:

- Education Act 1996
- Children Act 1989
- The Charges for Music Tuition (England) Regulations 2007
- The Education (Prescribed Public Examinations) (England) Regulations 2010
- DfE (2018) 'Charging for school activities'
- DfE (2019) 'Governance handbook'
- 'Our Funding Agreement'
- ESFA "Academy Trust handbook" for the relevant period

2. Charging for education

2.1. We will not charge parents for:

- Admission applications.
- Education provided during school hours.
- Education provided outside school hours if is part of the national curriculum, part of a syllabus for a prescribed public examination that the pupil is being prepared for by the school, or part of religious education.
- Instrumental or vocal tuition, unless provided at the request of the pupil's parents.
- Entry for a prescribed public examination, if the pupil has been prepared for it at the school.
- Examination re-sits, if the pupil is being prepared for the re-sits at the school.

2.2. We may charge parents for the following:

- Materials, books, instruments or equipment, where they desire their child to own them
- Optional extras
- Music tuition (in certain circumstances)
- Certain early years provision
- Use of community facilities and other commercial activities
- Provision of information within the scope of freedom of information.

3. Optional extras

3.1. We may charge parents for the following optional extras:

- Education provided outside of school time that is not:
 - Part of the national curriculum.
 - Part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school.
 - Religious education.
- Examination entry fees where the pupil has not been prepared for the examinations at the school
- Transport, other than that required to take the pupil to school or to other premises where the 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

3.2. When calculating the cost of optional extras, the school will only take into account the following:

- Materials, books, instruments or equipment provided in relation to the optional extra
- The cost of buildings and accommodation
- The employment of non-teaching staff
- The cost of teaching staff (including teaching assistants) under contracts for services purely to provide an optional extra
- The cost, or an appropriate proportion of the costs, for teaching staff employed to provide vocal tuition or tuition in playing a musical instrument

3.3. The school will not charge in excess of the actual cost of providing the optional extra divided by the number of participating pupils. We will not charge a subsidy for any pupils wishing to participate but whose parents are unwilling or unable to pay the full charge. If a proportion of the activity takes place during school hours, we will not charge for the cost of alternative provision for those not participating.

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- 3.4. Participation in any optional activity will be based on parental choice and a willingness to meet the charges. Therefore, parental agreement is a pre-requisite for the provision of an optional extra.

4. Examination fees

- 4.1. We may charge examination fees if:
- The examination is on the prescribed list (which includes SATs, GCSEs and A levels), but the pupil was not prepared for it at the school.
 - The examination is not on the prescribed list, but the school arranged for the pupil to take it.
 - A pupil fails, without good reason, to complete the requirements of any public examination where the governing board or LA originally paid or agreed to pay the fee.

5. Examination re-sits

- 5.1. Where a pupil is entered for a second or subsequent attempt at an examination, we will pay the fee. Once pupils have left the school, re-sits must be taken at the school.
- 5.2. If a pupil or their parents consider it to be in the best interests of the pupil to request that an examination is re-marked, any fees involved must be covered by the pupil or their parents. If the awarding body changes the overall grade of the result, the school will not be charged by the awarding body and the parent/pupil will have their fees refunded.

6. Voluntary contributions

- 6.1. We may, from time-to-time, ask for voluntary contributions towards the benefit of the school or school activities. If an activity cannot be funded without voluntary contributions, we will make this clear to parents at the outset. We will also make it clear that there is no obligation for parents to make a contribution, and notify parents whether assistance is available.
- 6.2. No child will be excluded from an activity simply because their parents are unwilling or unable to pay. If a parent is unwilling or unable to pay, their child will still be given an equal opportunity to take part in the activity. If insufficient voluntary contributions are raised to fund an activity, and the school cannot fund it via another source, the activity will be cancelled.
- 6.3. We will strive to ensure that parents do not feel pressurised into making voluntary contributions. Measures which may make parents feel pressured, such as colour coded letters and direct debit or standing order mandates, will not be sent when the school requests contributions.

7. Music tuition

- 7.1. Music tuition is the only exception to the rule that all education provided during school hours must be free. The Charges for Music Tuition (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 pupil's parents.
- 7.2. Charging will not be made if the teaching is an essential part of the national curriculum or if the teaching is provided under the first access to the KS2 Instrumental and Vocal Tuition Programme.
- 7.3. No charge will be made in respect of pupils who are LAC.

8. Transport

- 8.1. We will not charge for:
 - Transporting registered pupils to or from the school premises, where the LA has a statutory obligation to provide the transport.
 - Transporting registered pupils to other premises where the governing board or LA has arranged for pupils to be educated.
 - Transporting pupils to meet an examination requirement when they have been prepared for the examination at the school.
 - Transport provided for an educational visit.

9. Residential visits

- 9.1. We will not charge for:
 - 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, part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education.
 - Supply teachers to cover for teachers accompanying pupils on visits.
- 9.2. We may charge for board and lodging – but the charge will not exceed the actual cost.
- 9.3. 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

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- The guaranteed element of State 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)

The school will provide a form for parents to submit and provide proof of receipt of one of the above benefit payments in order to be eligible for the exemption. If the number of school sessions covered by the visit is equal to or greater than 50 percent of the number of half days (any period of 12 hours ending with noon or midnight on any day) spent on the visit, the school will not charge for the activity.

10. Education partly during school hours

- 10.1. If 50 percent or more of the time spent on an activity occurs during school hours (including time spent travelling if the travel occurs during school hours), it is deemed to take place during school hours and no charge will be made.
- 10.2. If less than 50 percent of the time spent on an activity occurs during school hours, it is deemed to have taken place outside school hours and we may charge for the activity; however, we will not charge if the activity is part of the national curriculum, part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education.
- 10.3. Residential visits: If the number of school sessions covered by the visit is equal to or greater than 50 percent of the number of half days (any period of 12 hours ending with noon or midnight on any day) spent on the visit, we will not charge for the activity.
- 10.4. The remission of charges for board and lodging payments is the responsibility of the school. These costs will be borne by our contingency funds.
- 10.5. Any charges for extended day services will be optional.

11. Damaged or lost items

- 11.1. The school may charge parents for the cost of replacing items broken, damaged or lost due to their child's behaviour. Parents will only be charged the replacement cost to purchase the same or equivalent item. The school will consider waiving costs in exceptional circumstances, e.g. financial hardship.

12. Remissions

- 12.1. We have set aside a small fund to enable families in financial difficulty to send their children on visits/activities. The funding is limited and there is no guarantee that all requests can be met. Assistance will be allocated on a needs basis, and if the full cost of the trip/activity cannot be met through assistance funding and voluntary contributions, the trip/activity will be cancelled.
- 12.2. Parents in receipt of any of the following benefits may request assistance with the costs of activities:
- 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 that they are not also entitled to Working Tax Credit and they 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)
- 12.3. To request assistance, parents should contact the individual school office for an assistance application form.

13. School trip refunds

All initial deposits for school trips will be non-refundable. Parents will be informed of this when they are provided with initial information about the trip.

In the event that the school has to cancel a trip due to foreseen circumstances, parental contributions will be refunded. In the event that a school trip is cancelled by a party other than the school due to unforeseen circumstances, it is at the school's discretion as to whether a refund is given to parents.

In the event that a pupil or their parents cancel the pupil's place on a trip, it will be at the school's discretion as to whether a refund is given. The school will take into account the reason for cancellation, whether the school will be reimbursed for the pupil's place on the trip, and whether the place on the trip can be offered to another pupil.

Where a pupil or their parents have previously cancelled a place on a trip and received a full refund, the school will have the right to refuse to allow the pupil to attend future trips and visits.

In the event that a pupil cannot attend a trip at the last minute, e.g. due to illness, it will be at the school's discretion as to whether a refund is given. The school will take into account whether the school will be reimbursed for the pupil's place on the trip and whether the place on the trip can be offered to another pupil.

In the event that a school trip is postponed due to unforeseen circumstances, it will be at the school's discretion as to what happens with the parental contributions for the trip. The school will consider its options, which could include carrying forward the money until the trip takes place, transferring the money to another trip, or refunding parents.

In the event that the decision is made to postpone a trip due to foreseen circumstances, it will be at the school's discretion as to what happens with the parental contributions for the trip. The school will consider its options, which could include carrying forward the money until the trip takes place, transferring the money to another trip, or refunding parents.

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 £1 per pupil.

The school will deal with cancellations and refunds on a case-by-case basis, ensuring that all pupils and their families are treated equally.

If a parent wishes to make a complaint about refunds, they will be able to do so via the Complaints Procedures Policy.

14. Income generation

In line with the ESFA's ATH, the trust will set fees for chargeable services at full cost, and reserves the right to apply an additional rate of return when in a commercial environment.

15. Freedom of Information Policy and Publication Scheme

The school's Freedom of Information Policy and Freedom of Information Publication Scheme will set out where fees may be charged for the provision of information.

16. Monitoring and review

This policy will be reviewed at least annually by the governing board. The next scheduled review date for this policy is October 2025.