



**MOWBRAY**  
Education Trust

# Charging & Remissions policy

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## Summary

Mowbray Education Trust believes that all our students should have an equal opportunity to benefit from Academy activities and visits (curricular and extracurricular) independent of their parents' financial means consistent with the Academy's budgetary position. This Charging and Remissions Policy describes how we will do our best to ensure a good range of visits and activities is offered and, at the same time, try to minimise the financial barriers which may prevent some students taking full advantage of the opportunities.

The Trust recognises that some pupils attract Pupil Premium funding, and in everything we do we aim to ensure that we support all students appropriately.

The 2011 Education Act requires all Academies to have a policy on charging and remissions for Academy activities, which will be kept under regular review. This policy reflects advice from the Department for Education (DfE) and sections 449 to 462 of the Education Act.

# Academy Trips

## Day Trips

No charge will be levied in respect of day trips that take place during Academy hours or are part of the curriculum. (but also refer to voluntary contributions section).

## Residential trips – Essential

For residential trips which are essential to the National Curriculum, statutory subjects or in preparation for prescribed examinations, a charge will be levied for board and lodging.

## Residential trips – Non-essential

For residential trips which are not essential to the National Curriculum, statutory or in preparation for prescribed examinations:

- if the amount of Academy time on the trip is less than half of the total time of the trip, a charge will be levied up to the full cost of the trip.
- if the amount of Academy time on the trip is half or more of the total time of the trip, a charge will be levied for board and lodging.

Academy Time is defined as activities during the course of a normal school day that are related to advancing understanding of curriculum subjects.

## Examination Entries

A charge will be levied in respect of examination entries for students where the Academy has not prepared the student for the examination.

A charge will be levied in respect of examination entries for students where:

- the Academy has prepared the student for the examination and
  - it considers that for educational reasons the student should not be entered and
  - the student's parent/guardian wishes the student to be entered.

In these circumstances, if the student subsequently passes the examination, the Academy may refund the cost.

A charge may be levied for students re-sitting an examination where it is believed by the Academy, in its absolute discretion, that the student has failed or under-performed in the preceding exam for reasons other than educational teaching.

A charge will be levied where a student fails without good reason to complete the requirements of any public examination where the Academy paid or agreed to pay the entry fee.

The charge levied in accordance with the above will be the cost of the examination entry, plus any applicable centre fee.

Where a department/the Academy deem it appropriate to use other services provided by exam boards the department/Academy will bear these costs. Individual parents who wish to use the services to access information on their son/daughter's individual performance in an exam or module may request the service from the exam's office at the Academy. In such cases the exam board's charge will usually be levied.

## Materials and Textbooks

Where a student or parent wishes to retain items produced as a result of art, craft and design, or design and technology, a discretionary charge may be levied for the cost of the materials used. Textbooks are provided on loan free of charge, but in some subjects, additional revision guides are available, for which a charge may be made.

## Music Tuition

Charges will not be made for class music tuition during Academy hours.

Music tuition, whether group or individual, will also be free, whether it is provided during or outside Academy hours, if it forms part of the syllabus for a prescribed public examination or required by the national curriculum.

No charges will be made for group activities e.g. Academy orchestra, which take place during Academy hours.

A charge will be made for individual and small group music tuition not forming part of a syllabus of a prescribed public examination or required by the national curriculum, provided parental agreement is obtained before a student is given the tuition. The charge may include:

- the cost of the teacher
- the costs of sheet music and
- the hire and insurance of a musical instrument.

Serious consideration will be given to requests for tuition from parents suffering from financial hardship with each case being judged independently at the Academy's own discretion.

Lessons must be paid for in advance, for a block of sessions.

The Academy will make a refund for a lesson missed only in the following circumstances:

- The student is taking an external examination
- The student is on an Academy trip
- The student is on work experience
- When an Academy test takes place during the period when a music lesson has been timetabled to take place. However, it is the responsibility of the student to inform the Music Teacher the day before to enable revisions to the timetable to take place. If no adjustment can be made, then a refund would be made.

If the teacher is absent and unable to take the lesson the cost of the next sessions will be reduced accordingly.

**Instrument hire** – Parents will be asked for a non – refundable charge. These funds will be used to upgrade old instruments.

The Academy reserves the right to terminate tuition if it does not consider groups to be viable or if progress/commitment is unsatisfactory. This will always be done after consultation with the instrumental teacher the student and parents.

Academy insurance will cover loaned instruments in Academy and on the journey to and from Academy. Parents' own insurance must cover the cost of replacement/repair should damage occur outside these times. Insurance should be taken out by parents for student's own instruments.

## **Education Activities taking place during Academy hours**

'Academy hours' are defined as being those hours during which the Academy is in session, but excluding the lunchtime break.

No charges will be made for any activity or materials which are essential to fulfil the statutory curriculum.

Voluntary contributions may be asked for to enable extra activities, which are deemed educationally desirable, to take place. It may also be stated that such an activity will not be able to take place unless enough contributions are received to finance the activity. The contributions requested will reflect the cost of that activity (including any consequential costs such as supply cover, transport, refreshments) less any subsidy from funds available to the Academy.

## **Educational Activities Outside Academy Hours**

No charge will be made for activities outside Academy hours that are part of the National Curriculum or religious education, or that form an essential part of the syllabus for an approved examination.

For all other activities outside Academy hours, a charge up to the cost of the activity will be levied.

## **Damage/Loss to Property**

A charge will be levied in respect of willful damage, neglect or loss of Academy property (including premises, furniture, equipment, books or materials), the charge to be the cost of replacement or repair, or such lower cost as the Head Teacher may decide.

A charge will be levied in respect of willful damage, neglect or loss of property (including premises, furniture, equipment, books or materials) belonging to a third party, where the cost has been recharged to the Academy. The charge to be the cost of replacement or repair, or such lower cost as the Head Teacher may decide.

## **Voluntary Contributions**

Where the Academy cannot levy charges, and it is not possible to make these additional activities within the resources ordinarily available to the Academy, the Academy may request or invite parents to make a contribution towards the cost of the trip. Students will not be treated differently according to whether or not their parents have made any contribution in response to the request or invitation. However, where there are not enough voluntary contributions to make the activity possible, then it will be cancelled and will be refunded as per surplus charges.

## **Lettings**

The Academy will make some of its facilities available to outside users at a charge of at least the cost of providing the facilities.



## Minibus

Only students on the roll within the Trust, staff or parents and carers of those students may travel on the vehicles owned by the Trust. Charges levied for use of the vehicles will not be constructed such as to make a profit. Charges may recover some or all of the costs of running the vehicle including loss of value.

## Other charges

As per Scheme of Delegation the Trust may agree to levy charges for miscellaneous services up to the cost of providing such services e.g. for providing a copy of an OFSTED report.

## Remissions Policy

If the parent/guardian of a student is in receipt of Income Support, Income based Jobseekers' Allowance, support under part VI of the Immigration and Asylum Act 1999; or Child Tax Credit (providing that they do not also receive Working Tax Credit and have an annual income, assessed by HMRC, that does not exceed the current rate applicable), charges in respect of board and lodging will be remitted in full.

As per Scheme of Delegation the Trust may agree to waive full or part charges in respect of a student, if it feels it is reasonable in the circumstances.

As per Scheme of Delegation the Trust may decide not to levy charges in respect of a particular activity, if it feels it is reasonable in the circumstances.

## Refund of surplus charges

No activity will have charges designed to make a profit.

Any surplus from a particular activity amounting to more than £5 per student will be distributed to parents who have paid for that activity. Surpluses below this will be retained within the Academy's operating reserves and used for the development of the Academy.

The Trust Board recognises its responsibility to ensure that the offer of activities and educational visits does not place an unnecessary burden on family finances. To this end we will try to adhere to the following guidelines:

- Where possible we shall publish a list of visits (and their approximate costs) as soon as possible so that parents/guardians can plan ahead
- We have established a system for parents to pay in instalments
- When an opportunity for a trip arises at short notice it will be possible to arrange to pay in instalments beyond the date of the trip
- We acknowledge that offering opportunities on a "first pay, first served" basis discriminates against students from families on lower incomes and we will avoid that method of selection wherever possible.

## Log of Changes to Document

Date	Version	Page	Change	Who:
February 2017	V1.0	Whole document	New format	SM
June 2017	V1.0	Whole document	Minor changes following review by Audit Committee	SM
October 2018	V1.0	Whole Document	Reviewed and approved by MET Audit committee meeting on 10 <sup>th</sup> October 2018	SC
Sept-19	V1.0	All pages	Annual Review – Addition on front page of version control panel and reformatting for policy consistency – no content changes made.	CFO/Assistant Operations Manager
Sept-19	V1.0	All pages	Annual approval	MET Audit Committee
Nov-20	V1.0	All pages Page 8	Spacing incorrections made Voluntary Contributions – addition to last sentence ‘and will be refunded as per surplus charges’	Trust Board Nominee (MC)
Dec-20	V1.0	All pages / Page 8	All clarifications suggested approved	Interim CFO
Oct 21	V1.0	Summary  Lettings / Other Charges / Remissions Policy	Education Act 1996 updated to Education Act 2011  Finance Committee updated to Audit, Finance & Risk Committee	Chief Financial Officer
Oct 22	V1.0	Throughout	‘This policy reflects advice from the Department for Education (DfE) and sections 449 to 462 of the Education Act.’ added to Summary section at the start.  Lettings section condensed	COO