



# **HART SCHOOLS TRUST**

## **CHARGES, REFUNDS AND REMISSIONS POLICY**

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## **1. LEGAL FRAMEWORK**

This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:

- Education Act 1996
- Children Act 1989
- 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 (2023) 'Academy trust handbook 2023' (ATH)

This policy operates in conjunction with the following school policies:

- Complaints Policy
- Freedom of Information Policy
- Trust financial regulations
- Examination Policy and Procedures
- Educational Visits
- Scheme of Delegation

## **2. STATEMENT OF INTENT**

The Hart Schools Trust (HST) wishes to ensure that all students are able to join in all areas of life at our academies regardless of the ability of an individual student's parents or carers to pay for such activities.

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.

## **3. CHARGING FOR EDUCATION**

No charges will be made for:

- Education provided during school hours (including the supply of any materials, books, instruments or other equipment)
- Education provided outside school hours if it is part of the National Curriculum or part of the school's basic curriculum for religious education
- Tuition for students learning to play musical instruments (or singing) if the tuition is required as part of the National Curriculum
- Education provided on any trip that takes place during school hours
- Education provided on any trip that takes place outside school hours if it is part of the National Curriculum or part of the school's basic curriculum for religious education
- Admission applications
- Entry for a prescribed public examination, if the student has been prepared for it at the school.
- Examination resits, if the student is being prepared for the resits at the school.

The school may charge for:

- Materials, books, instruments or equipment, where the child's parent wishes their child to own them.
- Optional extras.
- Music tuition (in certain circumstances).
- The use of community facilities and other commercial activities.
- Provision of information within the scope of freedom of information

#### **4. OPTIONAL EXTRAS**

The school may charge 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 student is being prepared for at the school
  - Part of RE
- Examination entry fees where the student has not been prepared for the examinations at the school
- Transport, other than that required to take the student to school or to other premises where the trust board has arranged for the student to be provided with education
- Board and lodging for a student on a residential visit
- Extended day services offered to students, e.g. breakfast or out-of-school provision

When calculating the cost of optional extras, an amount may be included in relation to the following:

- Materials, books, instruments or equipment provided in relation to the optional extra
- Buildings and accommodation
- Non-teaching staff, including TAs
- Teaching staff 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, where the tuition is an optional extra

The school will not charge in excess of the actual cost of providing the optional extra divided by the number of participating students. A subsidy will not be charged for any students wishing to participate 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 school will not charge for the cost of alternative provision for those not participating.

The school will not charge for supply teachers to cover for teachers who are absent from school accompanying students on a residential visit.

Participation in any optional activity will be on the basis of parental choice and a willingness to meet the charges; therefore, parental agreement is a prerequisite for the provision of an optional extra where charges will be made.

Parents have the right to know how each trip is funded and the academy can provide this information on request.

#### **5. VOLUNTARY CONTRIBUTIONS**

To enable the Trust to continue to offer a range of activities and outings, parents are sometimes asked to make voluntary contributions in certain circumstances. If a parent wishes their child to take part in a school trip or event, but is unwilling or unable to make a voluntary contribution, sometimes the school pays additional costs in order to support the visit in order that a child can participate fully

in the trip or activity. If the academy does not receive sufficient voluntary contributions the activity may not go ahead.

The detailed administration of this will be at the discretion of the individual Academy Headteacher. The academy will inform parents beforehand of the basis for such contributions, and of the arrangements for payment.

## **6. WHEN CHARGES MAY BE MADE**

### **a) Activities outside school hours**

Non-residential activities (other than those listed in section 2 above) which take place outside school hours, but only if the majority of the time spent on that activity takes place outside school hours (time spent on travel counts in this calculation if the travel itself occurs during school hours).

### **b) Activities partly during school hours**

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 will be deemed to take place during school hours and no charge will be made.

Whatever the start and finish times of the school day, regulations require that the school day is divided into two sessions. School hours will not include the break in the middle of the day.

If less than 50 percent of the time spent on an activity occurs during school hours, it will be deemed to have taken place outside school hours and the school may charge for the activity; however, the school will not charge if the activity is part of the national curriculum, part of a syllabus for a prescribed public examination that the student is being prepared for at the school, or part of RE.

### **c) Residential activities**

Board and lodging costs (but only those costs) of residential trips deemed to take place during school time. However, students whose parents are in receipt of certain benefits (see point 9 below) may not be charged for board and lodging costs.

Residential trips deemed to take place outside school time (other than for those activities listed in 1 above).

*Is a residential trip in or out of school time?*

If the number of school sessions on a residential trip is equal to or greater than 50 percent of the number of half days spent on the trip it is deemed to have taken place during school hours (even if some activities take place late in the evening). Whatever the starting and finishing times of the school day, regulations require that the school day is divided into two sessions. A 'half day' means any period of 12 hours ending with noon or midnight on any day.

When any trip is arranged, parents will be notified of the policy for allocating places.

### **d) Damaged or lost items**

The school may charge for the cost of replacing items that are damaged or lost due to the negligence or poor behaviour of pupils or their parents. 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.

## **7. COMMUNICATION**

The trustees recognise their 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 adhere to the following guidelines:

- Where possible, each academy will provide details of visits (and their approximate cost) three months in advance so that parents can plan ahead.
- Where possible, the academy will establish a system for parents to pay in instalments.
- The school will ensure that they inform parents on low income of the support available when asking for contributions towards the cost of school trips.
- When an opportunity for a trip arises at a discounted rate the academy may need to book this at short notice. In this instance it will be possible to arrange to pay by instalments beyond the date of the trip.
- The school will strive to ensure that parents do not feel pressured 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.
- The Trust acknowledges 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.
- When any trip is arranged, parents will be notified of the policy for allocating places e.g. Students will be asked to complete an expression of interest form before their place is confirmed. .

## **8. REFUNDS**

It will be clearly communicated in the letter at what point a refund will be possible for an educational visit. 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.

Where a student is unable to attend an educational visit and has paid money towards that visit, the school will try where possible to fill the place from the waiting list. If the vacant place is filled then the original place can be refunded. If it is not possible to fill the vacant place the school will not issue a refund.

In the event that a student 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 student's place on the trip and whether the place on the trip can be offered to another student.

If after completion of a trip or journey a surplus exists, the money will be applied as follows:

1. If the surplus is greater than 5% of the contribution per head, subject to a minimum of £5, then a refund of the full amount of the surplus will be offered to parents.
2. If the surplus is less than 5% of the contribution per head or less than £5, the surplus will be placed in the academy fund.

The school will deal with cancellations and refunds on a case-by-case basis, ensuring that all students 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 Policy.

## **9. CHARGING FOR RESOURCES**

Should parents or students wish to own a completed product produced as part of the curriculum, a charge may be made for the cost of materials, ingredients and equipment (or the provision of them by parents). This charge will be subject to parents having indicated in advance that they wish to own the finished product.

If a student wants to produce a project outside the range required of the curriculum specification, or one that is of a greater cost of the options provided by the academy, their parent will have to cover the full cost of such a project.

## **10. PORTABLE IT EQUIPMENT**

At HST we encourage students to utilise technology and our vision is for students to access 24 hour learning where possible. Where home devices are available, students wishing to take them home will be expected to formally agree to take care of any equipment loaned to them and be responsible for any damage or data breaches occurring because of the use of said equipment. The agreement document will be reviewed on an annual basis.

## **11. REMISSIONS**

No student is ever excluded from an activity for financial reasons and there is remission of charges in cases of financial difficulty. Each case is to be judged on its individual merits. Where a residential trip takes place wholly, or mainly, during academy hours and where it forms part of the syllabus for a prescribed public examination or the National Curriculum, students whose parents are in receipt of the support payments listed below will, in addition to having a free academy lunch entitlement, also be entitled to the remission of the charge for board and lodging.

- 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)

Phase note that the list above states remissions as of March 2024, but may change over time, in line with changes to thresholds, as dictated by government policy.

To request assistance, parents should contact the appropriate Head of Year.

Additional categories of parents may claim help with some costs in some circumstances.

## **12. PUBLIC EXAMINATIONS (SECONDARY ACADEMIES)**

Candidates will not be charged for changes of tiers, withdrawals made by the proper procedures or alterations arising from administrative processes provided these are made within the time allowed by the awarding bodies.

However, an examination entry fee may be charged in the following circumstances:

- Candidates decide to sit an exam after the late entry/withdrawal deadline/fail to sit an exam without medical evidence or evidence of other mitigating circumstances.
- A student has requested to sit an examination, which is outside the standard curriculum offering
- A student fails, without good reason, to complete the requirements of any public examination where the Academy originally paid, or agreed to pay, the entry fee.

### **Re-sits**

If a student or their parent consider it to be in the best interests of the student to request that an examination is re-marked, any fees involved will be covered by the student or their parent. Retake entries will only be accepted by the Examinations Manager upon receipt of the relevant fee and an application form signed by the candidate.

If the awarding body changes the overall grade of the result, the school will not be charged by the awarding body and the parent or student will have their fees refunded.

## **13. MUSIC LESSONS**

Instrumental and vocal music tuition is an 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 student's parents. The charges will not exceed the cost of the provision, including the cost of the staff providing the tuition.

Music lessons are provided and invoiced by Herts Music Service.

The academy may decide to subsidise fees for particular groups of students, for example those taking additional music lessons who are also studying for a public examination in Music. The subsidy will range from 50% up to 75% depending on family circumstances. The Trust will review costs and group exemptions annually, and the academy will give a minimum of four months' notice to any parent whose exemption is to be ended.

If a student fails, without good reason, to attend their music lesson, where the Academy originally paid for these lessons, the lessons may be withdrawn at the discretion of the Head of Music.

## **14. SWIMMING (PRIMARY ACADEMIES)**

Children in Key Stage 2 are offered swimming lessons. These take place in school time and are part of the National Curriculum. The academy will ask for a voluntary contribution towards this activity to meet the cost of the tuition and for the transport to and from the swimming pool. The academy will

inform parents when these lessons are to take place and we ask parents for their written permission for their child to take part in swimming lessons.

## **15. WAIVERS**

Trustees expect that parents who volunteer to incur a charge from the academy should meet that obligation. In cases of financial hardship, the Headteacher may reduce or write off unpaid debts in accordance with the amounts set out in the Scheme of Delegation.

## **16. CONCLUSIONS**

This policy is designed to balance the desire of Trustees that every student should be able to participate in all the academy's activities with the need to ensure that extra-curricular and voluntary activities are as self-financing as possible.

The Trustees will monitor the impact of this policy and evaluate the impact of the school's extended services on those children most in need of additional support by receiving regular financial reports and head teacher updates.