



# The Harmony Trust

## Charging and remissions policy

Description	By Whom	Date
Established		July 2017
Latest Review	CFO	September 2022
Approved by	Finance Committee	September 2022
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### 1. Aims

The Harmony 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 academy 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/carers on low incomes and in receipt of relevant benefits of the support available to them when asking for contributions.

Harmony Trust aims to:

- Have robust, clear processes in place for charging and remissions
- Clearly set out the types of activity that can be charged for and when charges will and will not be made
- Offer a range of activities and visits whilst minimising the financial barriers that may prevent some pupils from taking full advantage of these opportunities

### 2. Legislation and guidance

This policy is based on advice from the Department for Education (DfE) on [charging for school activities](#) and [the Education Act 1996](#), sections 449 to 462 of which set out the law on charging for school activities in England. Academies are required to comply with this Act through their funding agreements.

It's also based on guidance from the DfE on [statutory policies for schools and academy trusts](#).

This policy complies with our funding agreement, ESFA Academy Trust Handbook and articles of association.

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### 3. Definitions

- **Charge:** a fee payable for specifically defined activities
- **Remission:** the cancellation of a charge which would normally be payable

### 4. Roles and responsibilities

#### 4.1 The Board of Trustees

The Board of Trustees has overall responsibility for approving the charging and remissions policy, but can delegate this to a Committee, an individual Trustee or the Chief Executive Officer (CEO).

The Board also has overall responsibility for monitoring the implementation of this policy.

#### 4.2 The Principal

The Principal is responsible for ensuring staff are familiar with the charging and remissions policy, and that it is being applied consistently.

#### 4.3 Staff

Staff are responsible for:

- Implementing the charging and remissions policy consistently
- Notifying their line manager of any specific circumstances which they are unsure about or where they are not certain if the policy applies

#### 4.4 Parents/Carers

Parents/Carers are expected to notify staff or the Principal of any concerns or queries regarding the charging and remissions policy.

### 5. Where charges cannot be made

Below we set out what we **cannot** charge for:

#### 5.1 Education

- Admission applications
- 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
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the school
  - Religious education
- Instrumental or vocal tuition, for pupils learning individually or in groups, unless the tuition is provided at the request of the pupil's parent/carer

#### 5.2 Transport

- Transporting registered pupils to or from the academy premises, where the Trust has a statutory obligation to provide transport
- Transporting registered pupils to other premises where the Trust has arranged for pupils to be educated

- Transport provided in connection with an educational visit

### 5.3 Residential visits

- 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
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the school
  - Religious education
- Supply teachers, covering for teachers who are absent from school, accompanying pupils on a residential visit

## 6. Where charges can be made

Below we set out what we **can** charge for:

### 6.1 Education

- Any materials, books, instruments or equipment, where the child's parent/carer wishes him or her to own them
- Optional extras (see section 6.2)
- Music and vocal tuition, in limited circumstances (see section 6.3)
- Certain early years provision
- Use of community facilities (separate agreements will be in place for these arrangements)

### 6.2 Optional extras

We are able to charge for activities known as 'optional extras'. In these cases, academies can charge for providing materials, books, instruments or equipment. The following are optional extras:

- Education provided outside of school time that is not part of:
  - The National Curriculum
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the school
  - Religious education
- Transport (other than transport that is required to take the pupil to school or to other premises where the Trust 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 (such as breakfast clubs, after-school clubs, tea and supervised homework sessions)

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

- Any materials, books, instruments or equipment provided in connection with the optional extra
- The cost of buildings and accommodation
- Non-teaching staff
- Teaching staff engaged under contracts for services purely to provide an optional extra (including supply teachers engaged specifically to provide the optional extra)

- The cost, or an appropriate proportion of the costs, for teaching staff employed to provide tuition in playing a musical instrument, or vocal tuition, where the tuition is an optional extra

Any charge made in respect of individual pupils will not be greater than the actual cost of providing the optional extra activity, divided equally by the number of pupils participating.

Any charge will not include an element of subsidy for any other pupils who wish to take part in the activity but whose parents/carers are unwilling or unable to pay the full charge.

In cases where a small proportion of the activity takes place during school hours, the charge cannot include the cost of alternative provision for those pupils who do not wish to participate.

Parental agreement is necessary for the provision of an optional extra which is to be charged for.

### 6.3 Music tuition

Academies can charge for vocal or instrumental tuition provided either individually or to groups of pupils, provided that the tuition is provided at the request of the pupil's parent/carer.

Charges may not exceed the cost of the provision, including the cost of the staff giving the tuition.

Charges cannot be made:

- If the teaching is an essential part of the National Curriculum
- If the teaching is provided under the first access to the Key Stage 2 instrumental and vocal tuition programme
- For a pupil who is looked after by a local authority

### 6.4 Residential visits

We can charge for board and lodging on residential visits, but the charge must not exceed the actual cost.

## 7. Education 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 is deemed to take place during school hours and no charge will be made.

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.

**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.

The remission of charges for board and lodging payments is the responsibility of the academy. These costs will be borne by our contingency funds.

Any charges for extended day services will be optional.

## 8. Voluntary contributions

As an exception to the requirements set out in section 5 of this policy, the academy is able to ask for voluntary contributions from parents/carers to fund activities which would not otherwise be possible.

Therefore, from time-to-time, the academy may ask for voluntary contributions towards the benefit of the academy or academy activities. If an activity cannot be funded without voluntary contributions, we will make this clear to parents/carers at the outset. We will also make it clear that there is no obligation for parents/carers to make a contribution, and notify parents/carers whether assistance is available.

**There is no obligation for parents/carers to make any contribution, and no child will be excluded from an activity if their parents/carers are unwilling or unable to pay.**

If the academy is unable to raise enough funds for an activity or visit then it will be cancelled.

## 9. Damaged or lost items

The academy will charge parents/carers for the cost of replacing items broken, damaged or lost due to their child's behaviour. Parents/Carers will not be taken to court for failure to pay such costs.

## 10. Remissions

In some circumstances, the academy may not charge for items or activities set out in sections 6 and 8 of this policy. This will be at the discretion of the Executive Leadership Team (ELT) and will depend on the activity in question.

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.

### 10.1 Remissions for residential visits

Parents/Carers who can prove they are in receipt of any of the following benefits will be exempt from paying the cost of board and lodging for residential visits:

- 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 you're 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 4 weeks after you stop qualifying for Working Tax Credit
- Universal Credit – if you apply on or after 1 April 2018, your household income must be less than £7,400 a year (after tax and not including any benefits you get)

## 11. Monitoring arrangements

The Principal with support from the Finance team monitors charges and remissions, and ensures these comply with this policy.

This policy will be reviewed by the Head of Finance every two years.

At every review, the policy will be approved by the Finance Committee.