



## South Gloucestershire and Stroud Academy Trust (SGSAT)

### Charging and remissions policy

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<b>Job Title/Role:</b>	Director of Finance
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<b>Approved by:</b>	SGSAT Board of Trustees
<b>Date:</b>	26 June 2019

## Mandatory Initial Equality and Diversity Impact Screening

Main aim and purpose of the policy:	To set out the range of activities that organisations are permitted to charge parents and carers of students in the SGSAT establishments and the circumstances whereby parents and carers will be considered for the refund or omission of those charges.				
Is this policy (or its constituent parts) relevant to a general equality duty? (please tick)	This policy development will assist in the elimination of unlawful discrimination and/or harassment of identified Groups?	Implementation of this policy will promote equal opportunities for identified Groups?	Implementation of this policy will promote positive attitudes and participation between Groups?	Implementation of this policy will promote good relations between Groups?	
<b>Age</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<b>Disability</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<b>Gender Reassignment</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<b>Race or Ethnicity</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<b>Religion or Belief</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<b>Marriage</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<b>Pregnancy/ Maternity</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<b>Sex</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<b>Sexual Orientation</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<b>Carers/ Care givers</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<b>Persons in care</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Specify any Groups for which there is evidence or reason to believe that some Groups or individuals could be affected differently:					
None					
How much evidence is there:	None	A little	Some	A lot	
<b>Is there any concern that the policy may operate in a discriminatory way?</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	None	A little	Some	A lot	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Assessed relevance to equality (tick one row only)	High	Med	Low	None	Brief reason for this assessment
Age	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Disability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Gender Reassignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Race or Ethnicity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Religion or Belief	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Marriage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Pregnancy/ Maternity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Sex	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Sexual Orientation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Carers/ Care givers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
What is the next step? (tick one only)	What priority level is this policy?			Has the Policy been sent for Full EQIA, or do you believe the policy should have a Full EQIA?	
	High <input type="checkbox"/>	Medium <input checked="" type="checkbox"/>	Low <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
<b>I am satisfied that an initial screening has been carried out on this policy/procedure and a full Impact Assessment is not required</b>					
<b>Completed by:</b> Angela Humphrey		<b>Position:</b> Director of Finance		<b>Date:</b> June 2019	

# Charging and remissions policy

## 1. Introduction

- 1.1. This policy is one of a suite of SGSAT academic policies which applies across the trust. This policy has been created in order for the SGSAT to meet its statutory and legislative obligations. It is required by the Department for Education (DfE) and falls into the category of: Statutory Policies Required by Education Legislation. It is also in place to ensure equity of treatment for all students across the trust.
- 1.2. This policy applies to all academies, free schools, studio academies and university technical colleges within the SGSAT. These will be referred to generically as 'establishments' for the remainder of the policy.
- 1.3. SGSAT is committed to providing opportunities for students to extend their learning beyond the classroom in all of its establishments. The trust recognises the valuable contribution that the wide range of additional activities, including clubs, trips and residential experiences can make towards students' all round educational experience and their personal and social development.

## 2. Policy Aims and Objectives

- 2.1. This policy sets out the framework for the SGSAT by:
  - 2.1.1. Stating the range of activities that organisations are permitted to charge parents and carers of students in the SGSAT establishments.
  - 2.1.2. Stating the circumstances whereby parents and carers will be considered for the refund or remission of those charges.

## 3. Policy Statement

- 3.1. As a general rule, any activity or material that is required as part of normal curricular activities does not incur a cost to parents and carers.
- 3.2. Where required the SGSAT reserves the right to charge parents and carers in accordance with the provisions of the Education Act 1996.
- 3.3. The SGSAT cannot charge for:
  - 3.3.1. an admission application to any state funded school - paragraph 1.9 (n) of the 'School Admissions Code 2012' rules out requests for financial contributions as any part of the admissions process;
  - 3.3.2. education provided during SGSAT establishment hours (including the supply of any materials, books, instruments or other equipment);
  - 3.3.3. education provided outside of SGSAT establishment hours if:
    - 3.3.3.1. it is part of the National Curriculum,

- 3.3.3.2. or part of a syllabus for a prescribed public examination that the student is being prepared for at the SGSAT establishment,
- 3.3.3.3. or part of religious education;
- 3.3.4. entry for a prescribed public examination, where the student has been prepared for it at the SGSAT establishment and examination re-sit(s) where the student is being prepared for the re-sit(s) at the SGSAT establishment;
- 3.3.5. tuition for students learning to play musical instruments:
  - 3.3.5.1. if the tuition is required as part of the National Curriculum,
  - 3.3.5.2. or part of a syllabus for a prescribed public examination that the student is being prepared for at the SGSAT establishment
  - 3.3.5.3. or if it is provided under the first access to the key stage 2 Instrumental and Vocal Tuition Programme.
  - 3.3.5.4. no charge may be made for a student who is looked after by a local authority (within the meaning of section 22(l) of the Children Act 1989)
- 3.4. The SGSAT reserves the right to make a charge for:
  - 3.4.1. any materials, books, instruments, or equipment, where the student's parent or carers wishes them to own them. Materials to include; the cost of ingredients or raw materials used by students to make food, technology and Arts products, where the product will be the property of the student.
  - 3.4.2. optional extras (see below)
  - 3.4.3. music and vocal tuition to include the full costs associated with individual or small group tuition in the playing of a musical instrument, whether in or out of institution time at the request of the student's parent/carer. Charges may not exceed the cost of the provision, including the cost of the staff who provide the tuition.
  - 3.4.4. certain early years provision
  - 3.4.5. community facilities

#### **4. Optional extras**

- 4.1. Charges may be made for some activities defined as 'optional extras'. The Board of Trustees agrees that parents or carers should be asked to make 100% contributions towards the cost of these activities. Some students may be eligible for support towards the cost of these activities; any financial support offered will be subsidised by the SGSAT establishment.

- 4.2. Charges made in respect of individual students will not exceed the actual cost of providing the activity, divided equally by the number of students participating.
  - 4.2.1. The charge must not include an element of subsidy for any other students wishing to participate in the activity whose parents/carers are unwilling or unable to pay the full charge.
  - 4.2.2. Charges cannot include the cost of alternative provision for those students who do not wish to participate.
  - 4.2.3. No charge can be made for supply teachers to cover for those teachers who are absent from SGSAT establishment accompanying students on a residential visit.
- 4.3. Participation in any optional extra activity will be on the basis of parental choice and parental agreement to meet the charges.
- 4.4. Optional extras which can incur a charge include:
  - 4.4.1. education provided outside of SGSAT establishment time that is not:
    - 4.4.1.1. part of the national curriculum;
    - 4.4.1.2. part of a syllabus for a prescribed public examination that the pupil is being prepared for at the SGSAT establishment; or
    - 4.4.1.3. part of religious education.
  - 4.4.2. examination entry fee(s) if:
    - 4.4.2.1. the registered student has not been prepared for the examination(s) at the SGSAT establishment
    - 4.4.2.2. or for an examination where the SGSAT establishment considers the examination unsuitable for the student,
    - 4.4.2.3. or where the student fails to complete all of the requirements for the examination without evidence of good reason, such as a medical certificate
  - 4.4.3. any materials, books, instruments, or equipment provided in connection with the optional extra
  - 4.4.4. the cost of buildings and accommodation
  - 4.4.5. non-teaching staff
  - 4.4.6. teaching staff engaged under contracts for services purely to provide an optional extra, this includes supply teachers engaged specifically to provide the optional extra;
  - 4.4.7. transport (other than transporting registered pupils to or from the school premises, where the local education authority has a statutory obligation to provide transport; transporting registered pupils to other premises where the governing body or local

authority has arranged for pupils to be educated; and transport that enables a pupil to meet an examination requirement when he has been prepared for that examination at the school.)

- 4.4.8. SGSAT establishment trips and residential programmes held in SGSAT establishment time; including the board and lodging element of any residential or outdoor education programme.
- 4.4.9. activities held outside SGSAT establishment time; the full cost for each student of journeys, trips and residential fees in the UK and abroad which take place at weekends and during holidays, where these are deemed to be optional extras.
- 4.4.10. extended day services offered to pupils (for example breakfast club, end of day clubs, tea and supervised homework sessions).

## 5. Remission

- 5.1. Where those having financial responsibility for a student receive a qualifying benefit, we will remit the full cost of board and lodging for any residential activity which the student is required to attend and which takes place within academy time or is required for their studies at SGSAT.
- 5.2. When an SGSAT establishment informs parents about a forthcoming visit, they should make it clear that parents/carers who can prove they are in receipt of the following benefits will be exempt from paying the cost of board and lodging: (List correct as of May 2018 'Charging for school activities Departmental advice for governing bodies, school leaders, school staff and local authorities', current DFE guidance will always inform remission)
  - Universal Credit – if you apply on or after 1 April 2018 your household income must be less than £7,400 a year;
  - Income Support;
  - Income Based Jobseekers Allowance;
  - Working Tax Credit run-on – paid for 4 weeks after you stop qualifying for Working Tax Credit;
  - Support under part VI of the Immigration and Asylum Act 1999
  - Child Tax Credit, provided that Working Tax Credit is not also received and the family's income (as assessed by Her Majesty's Revenue and Customs) does not exceed £16,190;
  - the guarantee element of State Pension Credit;
  - an income related employment and support allowance.
- 5.3. On a case by case basis, SGSAT may remit charges in full or in part in response to a parental request on grounds of financial hardship where the request has the support of the Headteacher/Associate Headteacher (and the Deputy Chief Executive Officer if over £500).

## **6. Voluntary Contributions**

- 6.1. SGSAT reserves the right to request voluntary contributions for the benefit of the SGSAT establishment or any of its activities.
- 6.2. Activities may be organised during SGSAT establishment time that are voluntary and collective and can only take place provided sufficient voluntary contributions are received by a particular date.
- 6.3. If the activity cannot be funded without voluntary contributions, the governing body or head teacher should make this clear to parents and carers at the outset.
- 6.4. Where a request is made for a voluntary contribution from parent(s)/carer(s) for an activity, the SGSAT establishment will advise parent(s)/carer(s) at the outset and of the basis on which places will be allocated.
  - 6.4.1. For any such activity parent(s)/carer(s) are under no obligation to make any contribution but if insufficient contributions are received to cover the cost of the activity then the activity will be cancelled.
  - 6.4.2. If a parent/carer is unwilling or unable to pay, their child will still be given an equal chance to go on the visit.