



**CHARGING
POLICY**

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01	October 2018		Stephen Lester
02	September 2021	Annual review	Laura Watson
03	October 2022	Updated wording in line with the DfE guidance for occasions where contributions received exceed the actual cost and where there is excessive expenditure. Cost of cover is included in the calculation for non-curricula trips.	Laura Watson

CONTENTS

Section	Description	Page
	Statement of intent	
1	Introduction	5
2	Aims	5
3	Legal framework	5
4	Charging for education	5
5	Optional extras	6
6	Examination fees	7
7	Examination resits	7
8	Voluntary contributions	7
9	Music tuition	8
10	Transport	8
11	Residential visits	8
12	Education partly during school hours	9
13	Damaged or lost items	9
14	Remissions	9
15	School trip refunds	10
16	Freedom of information	11
17	Charge for use of trust facilities	11
18	Administration fees	11
19	Monitoring and review	11

STATEMENT OF INTENT

West Lakes Multi Academy 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.

Please note that while this policy may be more or less generous than the LA's, we have ensured it meets the requirements of the law.

1. INTRODUCTION

- 1.1 West Lakes Multi Academy Trust (the Trust) complies with the requirements of the Education Reform Act 1988. The Trustees endorse the guiding principles contained in the Act; in particular that no child should have its access to the curriculum limited by charges.

2. AIMS

- 2.1 To make a broad programme of visits and activities accessible to as many students as possible.
- 2.2 To establish and maintain a fair and coherent system of charges within the constraints of the budget.

3. LEGAL FRAMEWORK

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

- Education Act 1996
- 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'
- 'Our Funding Agreement'
- ESFA (2022) 'Academy Trust Handbook 2022'

- 3.2 This policy operates in conjunction with the following Trust policies and procedures:

- Community Use Policy
- Complaints Procedures Policy
- Freedom of Information Publication Scheme

4 CHARGING FOR EDUCATION

- 4.1 The Trustees wish to see the curriculum enriched as far as possible for the benefit of all students. They recognise that whatever public funds are made available they will never be sufficient to fund all desirable activities at the required level.

- 4.2 We will not charge parents for:

- Admission applications.
- Education provided during school hours.
- Education provided 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 by the school, or part of RE.
- 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 resits, if the pupil is being prepared for the resits at the school.

4.3 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)
- Vocational tuition (in certain circumstances)
- Certain early years provision
- Use of community facilities
- Provision of information within the scope of freedom of information

5 OPTIONAL EXTRAS

5.1 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
 - RE
- Examination entry fees where the pupil has not been prepared for the examinations at the school
- Transport, other than that arranged by the LA for the pupil to be provided with education
- Board and lodging for a pupil on a residential visit
- Extended day services offered to pupils

5.2 When calculating the cost of optional extras, the school will only take into account the cost, or an appropriate proportion of the cost, of the following:

- Materials, books, instruments or equipment provided in relation to the optional extra
- Buildings and accommodation
- Employment of non-teaching staff
- Teaching staff (including TAs) under contracts for services purely to provide an optional extra
- Teaching staff employed to provide vocal tuition or tuition in playing a musical instrument
- Cover costs where the activity is non-curricula.

5.3 The school will not charge in excess of the actual cost of providing the optional extra divided by the number of participating pupils.

5.4 The school will not charge a subsidy for any pupils wishing to participate but whose parents are unwilling or unable to pay the full charge.

- 5.5 If a proportion of the activity takes place during school hours, the school will not charge for the cost of alternative provision for those not participating.
- 5.6 The school will not charge for supply teachers to cover for teachers who are absent from school accompanying pupils on a residential visit.
- 5.7 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.
- 5.8 If a charge is to be made for a particular activity, such as optional extras, parents will be informed of how the charge will be calculated.

6 EXAMINATION FEES

- 6.1 The school may charge for 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.

7 EXAMINATION RESITS

- 7.1 Where a pupil is entered for a second or subsequent attempt at an examination, the school will pay the fee. Once pupils have left the school, resits must be taken at the school.
- 7.2 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 parents or pupil will have their fees refunded.

8 VOLUNTARY CONTRIBUTIONS

- 8.1 The school 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, the school will make this clear to parents at the outset. The school will also make it clear that there is no obligation for parents to make a contribution, and notify parents whether assistance is available.
- 8.2 No pupil 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.
- 8.3 The school will strive to ensure that parents do not feel pressurised into making voluntary contributions.

9 MUSIC TUTORION

- 9.1 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.
- 9.2 The charges will not exceed the cost of the provision, including the cost of the staff providing the tuition.
- 9.3 Charging will not be made if the teaching is an essential part of the national curriculum.
- 9.4 Charging will also not be made if the teaching is provided under the first access to the KS2 Instrumental and Vocal Tuition Programme.
- 9.5 No charge will be made in respect of pupils who are LAC.

10 TRANSPORT

- 10.1 The school 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.

11 RESIDENTIAL VISITS

- 11.1 The school 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 RE.
 - Supply teachers to cover for teachers accompanying pupils on visits.
- 11.2 The school may charge for board and lodging, but the charge will not exceed the actual cost.
- 11.3 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

- 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)

12 EDUCATION PARTLY DURING SCHOOL HOURS

- 12.1 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.
- 12.2 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 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 pupil is being prepared for at the school, or part of RE.
- 12.3 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.
- 12.4 The remission of charges for board and lodging payments is the responsibility of the school. These costs will be borne by the school's contingency funds.
- 12.5 Any charges for extended day services will be optional.

13 DAMAGED FOR LOST ITEMS

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

14 REMISSIONS

- 14.1 The school has set aside a small fund to enable parents in financial difficulty to send their children on visits and 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 or activity cannot be met through assistance funding and voluntary contributions, the trip or activity will be cancelled.
- 14.2 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)

14.3 To request assistance, parents should contact the Finance Director on 01946 820356.

15 SCHOOL TRIP REFUNDS

15.1 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.

15.2 In the event that the school has to cancel a trip due to foreseen circumstances, parental contributions will be refunded.

15.3 In the event that a school trip is cancelled due to unforeseen circumstances, it is at the principal's discretion as to whether a refund is given to parents. The principal will consult the governing board on the matter, taking into account the cost to the school, including alternative provision cost.

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

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

15.6 In the event that a pupil or their parents cancel the pupil's place on a trip, it is at the principal's discretion as to whether a refund is given. The principal will consult the governing board on the matter, taking 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.

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

15.8 In the event that a pupil cannot attend a trip at the last minute, e.g. due to illness, it is at the principal's discretion as to whether a refund is given. The principal will consult the governing board on the matter, taking 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.

- 15.9 The contributions received will not exceed the actual cost. Where contributions exceed the expenditure by a negligible amount, these will be retained in a restricted fund and distributed as appropriate at the end of the academic year. Where requests are received, any excess funds will be distributed within 7 working days.
- 15.10 Where there are not enough voluntary contributions, and there is no way to make up the shortfall, for example the school fund or fundraising activities, the trip may be cancelled.
- 15.11 The school will deal with cancellations and refunds on a case-by-case basis, ensuring that all pupils and their families are treated equally.
- 15.12 If a parent wishes to make a complaint about refunds, they can do so via the Complaints Procedures Policy.

16 FREEDOM OF INFORMATION ACT

- 16.1 Trustees reserve the right to make a charge for items disclosed in the Freedom of Information Publication Scheme.

17 CHARGE FOR USE OF TRUST FACILITIES

- 17.1 A charge will be made for the use of Trust accommodation (Lettings etc. please see separate Community Use Policy) and for all external word-processing, copy printing, design work, etc. Details are available from the Finance Director.

18 ADMINISTRATION FEES

- 18.1 A search fee of £10 per certificate will be levied for requests for all examination certificates not collected in the year in which they are awarded.
- 18.2 Subject to restrictions of the General Data Protection Regulation a fee of £50 will be charges for copies of an individual's academy record.

19 MONITORING AND REVIEW

- 19.1 This policy will be reviewed annually by the CEO, trust board and individual academy principal.
- 19.2 The next scheduled review date for this policy is October 2023.