



## Policy on **Charges and Remissions**

Revisions	September 2018
Review Date	Autumn 2019
Policy holder	F Azad

## **Preamble**

Mindful of the Gospel story that tells us “That the labourer is worthy of his hire,” The Holy Family Catholic School is aware of several items which, in justice, demand that payment is made.

In applying those charges Governors seek to be fair, just and equitable. It is in furtherance of that policy that this document has been produced.

Governors are aware that education provided in school hours is free. This precludes charging students for materials, equipment and transport provided in school hours. This does not prevent the Governors from permitting within this policy requests to parents for voluntary contributions.

Governors are also aware that public money may not be used to covertly subsidise community activity. The school is community-minded and seeks to support various local initiatives particularly in conjunction with the (moral) co-owners of the Sports Hall (Sport Keighley and Bradford & Airedale PCT). This support, whatever form it takes, is at nil-cost to the public funds in the Enabling account

## **Policy**

It is the policy of the Governors of The Holy Family Catholic School:

- To work within the legal framework for levying charges.
- To maintain a Welfare Fund to support students whose parents may need financial assistance in taking advantage of opportunities on offer via the school.
- To maximise school income within reason while being supportive of (especially charitable) work by other organisations that the school would wish to support in kind.

In managing this policy Governors make a clear distinction between activities which are an inherent part of the curriculum on offer and other activities which could be considered enhancements and, even though related to the curriculum, not an inherent part.

## **Appendix 1 - Legal background**

### **Charges cannot be levied for:**

- 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;
- 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<sup>1</sup>, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of 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;
- entry for a prescribed public examination, if the pupil has been prepared for it at the school; and
- examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school

### **Schools may charge for:**

- any materials, books, instruments, or equipment, where the child's parent wishes him/her to own them;
- optional extras (see page below);
- music and vocal tuition, in limited circumstances (see page 6);
- certain early years provision<sup>3</sup>;
- community facilities<sup>4</sup>.

### **Optional Extras**

Charges may be made for some activities that are known as 'optional extras'. Where an optional extra is being provided, a charge **can** be made for providing materials, books, instruments, or equipment. **Optional extras are:**

- education provided outside of school time that is not:
  - a) part of the national curriculum;
  - b) part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school; or
  - c) part of religious education.
- examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school;
- transport (other than transport that is required to take the pupil to school or to other premises where the local authority/governing body have 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 (for example breakfast club, after-school clubs, tea and supervised homework sessions).

In 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, this includes supply teachers engaged specifically to provide the optional extra; and
- 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 must not exceed the actual cost of providing the optional extra activity, divided equally by the number of pupils participating. It must not therefore include an element of subsidy for any other pupils wishing to participate in the activity whose parents are unwilling or unable to pay the full charge.

Furthermore 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. Therefore no charge can be made for supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential visit.

Participation in any optional extra activity will be on the basis of parental choice and a willingness to meet the charges. Parental agreement is therefore a necessary pre-requisite for the provision of an optional extra where charges will be made.

### **Voluntary contributions**

The school may seek voluntary contributions to defray the costs of activities for which it may not levy a charge. No child will be excluded from an activity because they have not contributed. Requests for such contributions will state clearly that the contribution is voluntary and that if sufficient contributions are not received then the activity will not take place.

## ***Appendix 2 – School protocols***

### ***Non-residential activities which are an integral component of the curriculum***

The school may seek voluntary contributions to defray the costs of these activities.

The contributions suggested will not exceed the anticipated cost the activity to each participant

Letters will make clear that contributions are voluntary and that no child will be excluded if they do not contribute

### ***Residential activities which are an integral component of the curriculum***

The school will seek voluntary contributions to defray the costs of these activities

The contributions suggested will not exceed the anticipated costs of the trip

Letters will make clear that contributions are voluntary and that no child will be excluded if they do not contribute

The school will pass on the charge for board and lodging, the charge will not exceed the actual cost

#### **Board & lodging on residential visits**

The Governors recognise that certain groups of people in receipt of certain benefits (ie qualifying for FSM – Free School Meals) are exempt from the need to contribute to board & lodging expenses on a residential.

Letters giving information about or inviting expressions of interest for residential visits will include information about exempt groups.

Parents claiming exemptions will be asked for documentary evidence.

### ***Optional extras taking place in school time***

The school will seek voluntary contributions to defray the costs of these activities.

The contributions suggested will not exceed the anticipated cost the activity to each participant

Letters will make clear that contributions are voluntary, that no child will be excluded if they do not contribute but that, if sufficient contributions are not received, that the activity may not take place.

### ***Optional extras taking place outside school time***

These will be charged at cost

Deposits will not normally be refunded unless the place(s) secured can be sold on.

Participants may be prevented from joining the activity if the full amount has not been paid prior to the trip

## ***Estimating charges***

The anticipated cost of a trip will be calculated to include a contingency which will be returned after the trip if it is not needed

When costs are shared out the figures will be rounded up to the next sensible unit.

Refunds will be made once the account is closed after the trip but refunds of less than £5 will not normally be made. Refunds of £10 or more will not be sent home with students without informing parents first.

## ***Calculating “in school time”***

If the number of school sessions taken up by the visit is equal to or greater than 50% of the number of half days spent on the visit, 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 2 sessions. A “half day” means any period of 12 hours ending with noon or midnight on any day.

### **Example 1: Visit during school hours**

Pupils are away from noon on Wednesday to 9pm on Sunday. This counts as 9 half days including 5 school sessions, so the visit is deemed to have taken place during school hours.

### **Example 2: Visit outside school hours**

Pupils are away from school from noon on Thursday until 9pm on Sunday. This counts as 7 half days including 3 school sessions, so the visit is deemed to have taken place outside school hours.

## ***Remissions***

The school maintains a Welfare Fund to cover remissions.

These remissions may be available to any member of the school who is in need and may, because of that need, miss the opportunity to join in an activity

Priority will be given to students in receipt of free school meals and activities which are integral part of the curriculum.

For optional extras outside school time the remission is more likely to be a loan to allow the trip charge to be paid on time with the family repaying as and when they can afford it.

### **Appendix 3 - In school charges**

In order to budget fairly and equitably within school there are certain in-school charges to be levied

#### **Items requiring recharge within school**

These items arise to allow the budget to be handled in an equitable manner or to allow bulk purchases to be made and saving passed on to Departments. For example exercise books which are uniform across the school can be bought in bulk and “sold on” within school.

These items will be charged at cost rounded up with an allowance made for damage and loss.

The charges for each financial year will be published with the budget.

#### **Items which are “bought” within school**

This item refers to matters such as the minibus, photocopying etc which Departments opt into buying.

Charges will be levied at cost rounded up with an allowance made for loss or damage.

Charges will reflect the fact that a lease may have to be paid on machinery or a sinking fund must be established for repair and/or replacement.

For example, the minibus has a lease charge made each year. It is just and proper that the cost of the lease is reflected in charges made otherwise non-users are being asked to subsidise the bus.

Charges may also reflect labour costs associated with delivery. Laminating, for instance, has a minimal raw material cost but takes a considerable portion of the Reprographic Staff’s time.

#### **Items which ought to be “bought” in school but which fall between Departments**

For example running the minibus for the benefit of school teams. There is no budget head for running school teams and it would be unfair to ask PE to carry the cost of school teams on their Departmental budget.

In such cases charges will be levied against a notional vote to allow – *in this case the minibus* – accounts to be brought to balance at the end of the year and costs of maintaining – *in this example- school teams* – to be calculated.

#### **Breakage and vandalism**

Where the culprits can be identified they will be expected to cover the costs of repair/replacement of any damage

## **Appendix 4 - Discounted rates on lettings**

Partners of the school (eg partner schools and parishes) and priority users (see below) will only be charged the “at cost” rate for lettings

Members of the school or of the wider school community especially if they are fundraising for a worthy cause may be charged at cost rather than at the full rate. The relevant officer for the area in question will agree the reduced charge with at least one member of the Management Team who is not involved in letting or hire.

Any organisation applying for a grant for activities to include hire of the school will be charged at the full (public) rate.

The menu list of prices will be published each year. Potential hirers will be made aware of likely charges and excesses which may apply in the process of accepting their booking.

## **Sports Hall**

The Sports Hall is a Lottery funded community Sports Hall which the Governors hold in trust. The founding document identifies priority users as

“Clubs with junior, intermediate and senior sections; with links to their national or regional body; holding or working towards ClubMark or similar.”

These conditions are deigned to ensure progression both through the age ranges and abilities together with good practice.



## Appendix 5

<b>Letting &amp; hire charges from September 2015</b>		
<b>Item</b>	<b>Cost</b>	<b>Notes</b>
Letting - Priority rate	£20/hour	
Letting – standard rate	£30/hour	
Letting – school use for fundraising	£20/hour (or 50% of income, whichever is the lesser figure)	
Sports Hall – priority rate	£20/hour	
Sports Hall – general rate	£35/hour	5-a-side = £3.50 each;(ie £29.17 + £5.83VAT)
Lettings – Hall etc – priority use	£30/hour	
Lettings – Hall etc – Standard rate	£35/hour	
Lettings – Hall etc - – school use for fundraising	£25/hour (or 50% of income, whichever is the lesser figure)	
Letting - Changing facilities	£15/session	
Letting - Fields & pitches	£15/hour, minimum £40 per session	
Minibus	25p/km	Dependent on insurance & Midas licences being in place

## **Appendix 7 – Exempt groups**

Exempt groups who may not be asked to contribute towards board & lodging on a residential visit (June 2012)

Those in receipt of:

- 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 Guarantee element of State Pension Credit
- Child Tax Credit, provided they are not entitled to Working Tax Credit and have an annual income of £16,190 or less
- Working Tax Credit 'run-on' - the payment someone may receive for a further four weeks after they stop qualifying for Working Tax Credit
- Universal Credit - In England, if you apply on or after 1 April 2018 your household income must be less than £7400 a year (after tax and not including any benefits you get). If your child is currently eligible for free school meals, they'll remain eligible until they finish the phase of schooling (primary or secondary) they're in on 31 March 2022.

The eligibility criteria are deliberately aligned with those for FSM (Free School Meals) to facilitate administration of remissions by schools. The school therefore uses grant of FSM as the sole eligibility criterion