



**DISCOVERY**  
EDUCATIONAL TRUST

## **Charges, Refunds and Remissions Policy**

Title	Charges, Refunds and Remissions Policy
Author/Owner	Finance and Resources Committee
Status	Final - Approved
Ratified Date	July 2021
Ratified by	Trust Board
Review Cycle	Annual
Review Date	July 2022
Security Classification	OFFICIAL

# CHARGING, REFUNDS & REMISSIONS POLICY

**Relevant to:** Academies and MATs

**Status:** Statutory

Instruction: Please complete details on Page 2 and delete this front page

*Green type means that the school needs to consider this section and either insert their own wording or where applicable adopt the suggested wording*

**DATE** December 2020

**LAST EDITION:** N/A

**REVIEW:** Annual

Updates since last edition

N/A		
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Published by:

Juniper Education, Education HR

Boundary House, 4 County Place, Chelmsford, Essex CM2 0RE

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## 1. Introduction and Guiding Principles

The Discovery Educational Trust (DET) Trust Board (TB) has resolved to make charges as allowed by sections 449-462 of the Education Act 1996. DET is required to comply with this Act through its Funding Agreement.

DET and its Schools recognise the valuable contribution that a wide range of additional activities, including trips, clubs and residential experiences can make towards pupils' education. DET and its Schools aim to promote and provide such activities both as part of a broad and balanced curriculum and as additional optional activities. This Charging, Refunds and Remissions Policy explains when, and if, charges will apply to these activities.

### Guiding Principles

Where education is provided wholly or mainly during school hours, it is not possible to levy a compulsory charge for any costs, including the supply of materials, books, instruments or other equipment.

In addition, DET and its Schools cannot charge 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 curriculum or part of religious education
- Tuition for pupils learning to play musical instruments, if the tuition is required as part of the curriculum or part of religious education
- An admission application.

Schools and Local Authorities (LAs) can charge for:

- Any materials, books, instruments, or equipment, where the child's parent/carer wishes him/her to own them;
- Optional extras (see below); and
- Music and vocal tuition, in limited circumstances.

## 2. Charging Policy

### 2.1 School Meals

The charge for a school meal is set annually by the TB following consideration of the Catering Business Plan as part of the annual budget setting process.

All meals taken by pupils, who are not eligible for Free School Meals (FSM), are chargeable and parents/carers are expected to make prompt payment. Where payments are not made in advance of the meal being taken, parents/carers are reminded of the debt by email/ letter.

There is no charge for pupils, who are entitled to FSM or Universal Infant FSM.

### 2.2 Educational Visits:

DET asks for voluntary contributions towards the cost of day visits that, although not strictly necessary to fulfil the requirement of public examinations or the curriculum, provide interesting, stimulating and valuable experiences.

DET Schools:

- Seek voluntary contributions from parents/carers, where applicable.

- Do not exclude a child from participating in an activity during the school day on financial grounds.

All trips across all DET Schools are expected to break even and it is at the discretion of the Headteacher (HT) whether to cancel an activity/visit due to parents/carers declining to make the requested voluntary contribution (their identity remains confidential) based on the overall shortfall.

### **2.3 Residential Activities:**

The costs of residential activities can be high and such activities may only continue to be available if sufficient costs are recovered (refer Appendix A).

Charges that apply:

- travel costs – transport to and from the residential activity
- board and lodging
- full cost of board and lodging on residential trips whether or not the trip takes place during school hours
- parents/carers are informed of the cost before the activity takes place
- costs of supply staff engaged to cover the staff accompanying pupils on a residential trip where the trip takes place during term time
- full cost recovery for residential activities that take place outside of school hours.

NB. At HT discretion, DET Schools may subsidise the cost of any residential trip for children of families claiming FSM.

No charge applies:

- where parents/carers, who are in receipt of certain benefits, may claim exemption in accordance with the Remissions guidance below
- for education costs incurred on any visit during school hours
- for education costs incurred on any visit outside school hours if it is part of the School's curriculum.

DET and its Schools follow the provisions in the legislation and regulations regarding charging for activities and residential trips that occur partly during school hours. If the number of school sessions taken up by the trip is more than 50% of the number of half days spent during the trip, it is deemed to have taken place during school hours and, as such, cannot be charged for. The Schools then ask for voluntary contributions.

All trips across all DET Schools are expected to break even and it is at the discretion of the HT whether to cancel an activity/visit due to parents/carers declining to make the requested voluntary contribution (their identity remains confidential) based on the overall shortfall.

Refer also to Appendix A.

### **2.4 Music Tuition**

Instrumental tuition or singing lessons do not form part of the curriculum, but are an additional activity arranged by DET and its Schools and delivered by specialist tutors either on an individual basis or as part of a group, following parent/carer request. The cost of such lessons is dependent on the charges applied by the tutors, the size of the group, the duration and frequency of each lesson.

DET and its Schools operate on full cost recovery basis. However, in order to ensure equal opportunities for all pupils, charges for music tuition within school hours for pupils eligible for FSM or children in care are considered for remission in accordance with this policy (see section 8. Remissions Policy).

There is no charge applied if the music tuition forms part of a public examination syllabus being followed by a pupil of School.

## **2.5 Examination Fees**

No charge when:

- an exam is part of the curriculum
- an exam is on the School's set examinations list
- the pupil has been prepared for that exam by the School
- the exam is not on the set list, but has been arranged by the School

Charges do apply when:

- the pupil has not been prepared for the exam by the School
- the pupil wishes to re-sit an exam
- the pupil fails to reach the required standard without good reason (the School may ask that parents pay the original exam fee).

## **3. Extra-Curricular Activities**

### **3.1 Curriculum-Related Clubs**

DET and its Schools provide a well-rounded and extensive education for its pupils, which includes a wide range of extra-curricular activities (extended services). Extended services enable DET and its Schools to provide:

- high-quality learning opportunities either end of the school day
- ways of increasing pupil engagement
- ways of improving outcomes and narrowing gaps in outcomes between different groups of pupils.

Where these activities run outside of normal school hours, i.e. sports clubs, homework club, art club, a charge may be made to cover costs of equipment, teaching or non-teaching staff, specialist staff/coaches, transport to events such as sports fixtures, or materials used. The total charge does not exceed the actual costs incurred in the provision of the activity and is set by the HT in consultation with the Local School Committee and with the agreement of DET's Central Finance Team.

Parents/carers are advised of any such costs before their child is allowed to undertake any such activity and participation is based on the parent's willingness to pay the charges.

Parents/carers are able to claim remission from such charges in accordance with the remissions guidance in this policy.

#### **Breakfast Club**

Parents/carers are invoiced monthly in arrears for the sessions that their child has attended. Invoices are payable within seven days and the Breakfast Club provision is unavailable to any child where invoices remain unpaid.

#### **After School Club**

Parents/carers are invoiced monthly in arrears for the sessions that their child has attended. Invoices are payable within seven days and the After School Club provision is unavailable to any child where invoices remain unpaid.

#### **4. Other Areas**

Charges apply:

- for books and materials belonging to the School that a pupil has lost
- for books and materials that a parent wishes a pupil to keep after having been advised of the cost
- for activities taking place outside of school hours that are not:
  - part of the School curriculum
  - part of a syllabus for a public examination that the pupil is being prepared for by the School
  - part of the School's basic religious education
- for property damage – each individual case to be decided upon by the HT
- for full repair costs incurred as a result of wilful or reckless damage to DET/School property by a pupil or parent/carer
- for full recovery of costs incurred by DET/School as a result of damage caused by a pupil to third party property.

No charges apply:

- for activities taking place during school hours, except any of those listed above
- for transport during school hours for School-organised activities, except for educational visits as detailed above
- for activities outside school hours that are part of the:
  - set curriculum, including sports matches against other schools
  - syllabus for a public examination that the pupil is being prepared for by the School
  - School's basic religious education syllabus
- for admissions.

#### **5. Voluntary Contributions**

DET Schools may, from time to time, ask parents/carers for voluntary contributions to the School general funds in order to assist with the provision of resources to enhance their children's education. There is no pressure exerted and any contribution is gratefully received.

The School may request a contribution for ingredients, materials or equipment (or the provision of them by parents/carers) for practical subjects, such as Food Technology, or require them to be provided if the parents have indicated, in advance, that they wish to own the 'finished product'.

Where the voluntary contribution applies to an educational visit or extra-curricular activity, if the sufficient level of contributions is not achieved, that activity is cancelled; any monies already collected are refunded to the relevant parents/carers.

## **6. DBS Checks**

DET and its Schools cover the cost of DBS checks for all employed staff.

There are no costs incurred as a result of DBS checks for volunteers.

## **7. Refunds Policy**

### **7.1 School Meals**

Where payment for a school meal is received in advance and the pupil is absent due to illness, the funds are retained to be used for future meals.

If the School has to cancel meal provision for a short time, the income received in advance is recorded against each individual pupil to be used to cover future meals; the parent/carer is entitled to request a refund of these monies at any time.

When a pupil leaves the School and income has been received, but meals not taken (and the credit balance cannot be transferred to a sibling), the parent/carer receives a refund, typically, if the credit balance is £10 or more. Refunds for lesser amounts can be requested.

### **7.2 Educational Visits**

When a pupil is absent due to illness and does not attend an educational visit, the transport/entrance cost is not refunded, where already committed. However, where possible, the School endeavours to recover costs related to that activity and, if successful, refunds the parent/carer.

If a trip has to be cancelled by the School, parental contributions are refunded, less any initial deposits withheld by the venue and Parent Pay fees.

Where contributions for a day trip/activity exceed the final total cost by more than £10 per pupil, a refund is given.

Excess income less than £10 per pupil is retained in School funds. Excess expenditure is paid from School funds.

Where contributions for a residential trip exceed the final total cost by more than £25 per pupil, a refund is given.

Excess income less than £25 per pupil is retained in School funds. Excess expenditure is paid from School funds.

### **7.3 Residential Activities**

If a pupil does not attend a residential activity due to illness, the School endeavours to recover costs through the trip insurance and, if successful, passes this refund onto the parent/carer; note that initial deposits may be retained by the travel company.

Where a residential trip is cancelled by the travel company, the School endeavours to recover full refunds, which, upon receipt, are passed onto the parents/carers.

Where a residential trip is cancelled by the School, parental contributions, already received, are refunded, less any initial deposits withheld by the venue and Parent Pay fees.

### **7.4 Music Tuition**

Where instrumental or singing lessons are cancelled by the tutor or the School, and payment has already been received, the School transfers the funds to cover future lessons taken by the

relevant pupil. If lessons are not being continued in the following term, the parent/carer may request a refund.

Where a pupil fails to attend a pre-booked lesson, refunds do not apply.

### **7.5 Extra-Curricular Activities**

If a pupil does not attend an activity due to illness, refunds do not apply.

Where curriculum-related clubs are cancelled by the School, the income received is held to cover the cost of the next round. Where pupils are not taking part in the future, parents/carers are entitled to request a refund.

### **7.6 Outside of School Hours Activities - not part of the curriculum, or public examination syllabus or part of the School's basic religious education**

If a pupil does not attend an activity due to illness, refunds do not apply.

Where the activity is cancelled by the School, the income received is held to cover the cost of the next round. Where pupils are not taking part in the future, parents/carers are entitled to request a refund.

Where the activity is arranged by the School, but has been cancelled by external organisers/tutors/sports coaches, the School endeavours to obtain refunds, which, upon receipt, are passed onto the parents/carers.

Where an activity arranged by external organisers directly with parents/carers is cancelled, the parents/carers must contact the organisers to obtain a refund in accordance with the separate booking agreement.

### **7.7 Breakfast and After School Clubs**

Refunds are made in accordance with the rules laid down in the separate Breakfast/After School Club Agreements.

## **8. Remissions Policy**

The HT and Chair of the TB authorise the remission of charges in all cases.

The School considers the remission of charges to parents/carers, who receive the relevant support payments (in accordance with the current Department for Education (DfE) listing), which make their child/children eligible for FSM and for children in care.

All claims for remission of charges should be addressed to the HT and are dealt with confidentially.

DET and its Schools may decide to subsidise part of or all charges for some activities and pupils; each event or case is considered individually by the HT and the Head of Finance/EHT.

## **9. Complaints**

Complaints about the implementation of this policy or any decisions taken in line with this policy should be made in accordance with DET Complaints Policy and Procedure.

## **Appendix A - Education partly during school hours**

Where an activity takes place partly during and partly outside school hours, there is a basis for determining whether it is deemed to take place either inside or outside school hours. However, a charge can only be made for the activity outside school hours if it is not part of the national curriculum, not part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school and not part of religious education.

If 50% or more of the time spent on the activity occurs during school hours, it is deemed to take place during school hours. Time spent on travel counts in this calculation if the travel itself occurs during school hours. School hours do not include the break in the middle of the day.

Where less than 50% of the time spent on an activity falls during school hours, it is deemed to have taken place outside school hours. For example, an excursion might require pupils to leave school an hour before the school day ends, but the activity does not end until late in the evening. See section 452 of the Education Act 1996 for guidance as what counts as during school hours.

### **Non-residential activities**

If 50% or more of the time spent on the activity occurs during school hours, it is deemed to take place during school hours. Time spent on travel counts in this calculation if the travel itself occurs during school hours. School hours do not include the break in the middle of the day.

Where less than 50% of the time spent on an activity falls during school hours, it is deemed to have taken place outside school hours. For example, an excursion might require pupils to leave school an hour before the school day ends, but the activity does not end until late in the evening.

### **Residential visits**

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 be divided into two sessions. A 'half day' means any period of 12 hours ending with noon or midnight on any day.

#### **Example 1**

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

#### **Example 2**

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

#### **Source:**

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