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Company Registration Number: 10745840 (England and Wales)

Ethos Academy Trust

Charges & Remissions Policy

November 2021

1	Summary	Charges & Remissions Policy
2	Responsible person	CFOO
3	Accountable ELT member	CFOO
4	Applies to	<input checked="" type="checkbox"/> All Staff <input type="checkbox"/> Support Staff <input type="checkbox"/> Teaching Staff
5	Trustees and/or individuals who have overseen development of this policy	Dewi Bennett - CFOO
6	Headteachers/Service Heads who were consulted and have given approval (if applicable)	N/A
8	Ratifying committee(s) and date of final approval	Finance, Audit & Risk Committee (FARC)
9	Version number	1.7
10	Available on	Every <input checked="" type="checkbox"/> Y <input type="checkbox"/> N Trust Website <input type="checkbox"/> Y <input checked="" type="checkbox"/> N Academy Website <input checked="" type="checkbox"/> Y <input type="checkbox"/> N Staff Portal <input type="checkbox"/> Y <input checked="" type="checkbox"/> N
11	Related documents (if applicable)	
12	Disseminated to	<input type="checkbox"/> Trustees <input type="checkbox"/> All Staff <input type="checkbox"/> Support Staff <input type="checkbox"/> Teaching Staff
13	Date of implementation (when shared)	22.11.21
14	Date of next formal review	November 2022
15	Consulted with Recognised Trade Unions	<input type="checkbox"/> Y <input checked="" type="checkbox"/> N

Date	Version	Action	Summary of changes
November 2021	1.6	Policy revision	Amended an out of date link – no other changes necessary.

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1.0 Introduction

- 1.1 The Trustees of Ethos Academy Trust recognise the valuable contribution that the wide range of additional activities can make towards a pupil's education. The Board of Trustees aim to promote and provide such activities as part of a broad and balanced curriculum for the pupils of the Trust and as additional optional activities.
- 1.2 There are two types of financial contributions for which parents and carers can be asked to support in relation to educational activities:
- Voluntary contributions
 - Permitted charges
- 1.3 A large number of our pupils are designated as Pupil Premium pupils (i.e. they have been entitled to free school meals within the last 6 years) and therefore it is rare that any charge is levied by the Trust for educational activities.
- 1.4 In addition, the Trust and its academies may make a charge to external organisations, including schools and community groups for educational services, consultancy, hire of premises or other activity permitted within its funding agreement. Whilst the Trust should not make a profit from such activities, it will charge reasonable overhead costs to ensure that all costs incurred in the provision of such services are covered and are not detrimental to the running of the Trust.

2.0 Activities Without Charge

- 2.1 There will be no charge for the following activities (this is in line with government guidance): -
- Education provided wholly or mostly during school hours. This includes the supply of any materials, books, instruments, other equipment and also transport provided in school hours to carry pupils to and from school or to an activity;
 - Education provided outside school hours if it is part of the National Curriculum or our core offer;
 - Instrumental and vocal music tuition for pupils learning individually or in groups if this is part of the core offer; and
 - Entry for a prescribed public examination including re-sits if the pupil has been prepared for it at a Trust academy.

3.0 Voluntary Contributions for Educational Activities

- 3.1 Nothing in legislation prevents an Academy Trust from asking for voluntary contributions for the benefit of the Trust or any Trust activities. However, if the activity cannot be funded without voluntary contributions, the Trust or Headteacher should make this clear to parents and carers at the outset. The Headteacher **must** also make it clear to parents and carers that there is no obligation to make any contribution.

3.2 It is important to note that no child should be excluded from an activity simply because his or her parents or carers are unwilling or unable to pay. The Trust and/or its academies must make sure that they make this clear to parents and carers. If a parent/carer is unwilling or unable to pay, their child must still be given an equal chance to go on the visit. The Trust and /or its academies should make it clear to parents and carers at the outset what their policy for allocating places on each visit will be. Additional charges **will not** be levied to those parents and carers who do pay to subsidise any other pupils wishing to participate in the activity whose parents and carers/carers are unwilling or unable to pay the full charge.

3.3 When making requests for voluntary contributions to the Trust funds, parents and carers must not be made to feel pressurised into paying as it is voluntary and **not compulsory**. The Trust and its academies should avoid sending letters to parents and carers via pupils reminding them that they have not paid. The Trust and its academies should also ensure that direct debit or standing order mandates are not sent to parents and carers when requesting for contributions.

4.0 Permitted Charges

4.1 Permitted charges are a direct request to cover certain costs involved with a Trust activity or visit. Whilst no charge can be made in respect of education provided during school hours (which excludes the midday break), a charge may be made however for board and lodgings on any residential educational visit.

Materials & Textbooks

4.2 Where a pupil or parent wishes to retain items produced as a result of art, craft and design, or design and technology, a charge may be levied for the cost of the materials used. Textbooks are provided free of charge.

Music Tuition

4.3 Although the law states that all education provided during school hours must be free, music tuition is an exception to this rule within the state education sector.

4.4 The Education and Inspections Act 2006 introduced a regulation-making power which allowed the Department for Education to specify circumstances where charging can be made for music tuition. The new Regulations, which came into force in September 2007, provide pupils with greater access to vocal and instrumental tuition.

4.5 Charges may now be made for teaching either an individual pupil or groups of any appropriate size (provided that the size of the group is based on sound pedagogical principles) to play a musical instrument or to sing. **Charges may only be made if the teaching is not an essential part of either the National Curriculum or a public examination syllabus being followed by the pupil(s), or the first access to the Key Stage 2 Instrumental and Vocal Tuition Programme (Wider Opportunities).** At Ethos Academy Trust currently, all music tuition forms part of our core curriculum offer and is therefore free of charge.

Residential Activities/Activities Outside School Hours

4.6 If the activity is held outside school hours and is education other than non-chargeable education, then it is regarded as an “optional extra”. A charge may be made for the full cost of the activity but must not exceed the actual cost of providing the activity. The

charge may include the costs of travel, board and lodgings, additional staff costs, entrance fees, materials and equipment. However, the charge made to individual parents and carers cannot include any cost added to subsidise parents and carers of children who are unwilling or unable to pay the charge.

4.7 *When is an activity held in school hours?*

If the number of academy 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

- 4.8 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

- 4.9 Pupils are away 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.

Damage/Loss to Property

- 4.10 A charge may be levied in respect of wilful damage, neglect or loss of Trust property (including premises, furniture, equipment, books or materials), the charge to be the cost of replacement or repair, or such lower cost as the Headteacher may decide.

Other charges

- 4.11 The Trustees, Executive Team or Headteacher for miscellaneous services up to the cost of providing such services including reasonable overheads e.g. for providing consultancy services, hire of premises or other activities permitted within the funding agreement.
- 4.12 For requests of copies of documents, the Trust will levy a charge of 10p per sheet for a copy of any document which exceeds 10 pages in length.

5.0 Remissions

- 5.1 Where non-chargeable education is provided during a residential visit, Pupil premium pupils may receive a complete remission of any charges that would otherwise be payable in respect of board or lodgings.

Government guidance providing details of the benefits which exempt parents and carers from being charged can be found at:

[Charging for school activities \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

- 5.2 Where charges are to be made by the Trust for optional extras, parents and carers may receive a remission for the whole or part of the charge.