



Charging and Remissions Policy

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Document Control Page

Revision	Date	Change	Origin of Change
Format Change	Sep-24	Added Doc info/control	CFO Format pref
Font change	Sep-24	Font to Century Gothic over whole doc	Branding
Updated the early years funding	Sep-24	15hours funding now includes 2year olds	Government guidance
School specific paragraphs removed (8-10 inclusive)	Sep-24	School specific paragraphs removed as they follow this policy there is specific reference already in policy referring to school circumstances	Duplication of reference and covered at school level policy
Creation of a dynamic table of contents	Sep-24	Added convenience and accuracy on updates	Old ToC didn't do this and had errors in previous doc

Other Policies and Documents Associated
Finance Manual;

Have updated the early years as 15 funding now includes 2 year olds.

And have removed the paragraphs that were school specific as these should really be detailed on their website and not in the trust level policy

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1. Introduction

- 1.1 The purpose of the policy is to ensure that there is clarity over those items that the academies will provide free of charge and for those items where there may be a charge or a request for a voluntary contribution.
- 1.2 The policy has been drawn up in accordance with the requirement of Section 110 of the Education Reform Act 1988. The Education Act of 1996 (Sections 449-462) sets out the law on charging for school activities. More detailed information can be found in the Department for Education advice Charging for School Activities available [here](#).

2. Summary

- 2.1 All activities and resources that are provided during the school day and considered a necessary part of the curriculum will be provided free of charge.
- 2.2 No pupil will be prevented from participating because his / her parents cannot or are not willing to make a voluntary contribution. However, if insufficient funds are available to run an activity it may be necessary to curtail or cancel activities.

3. Charges relating to the Provision of Education during the school day

- 3.1 Charges are not made for educational activities that take place during school hours. However, voluntary contributions may be sought for trips and opportunities during the school day that entail additional costs. There is no obligation on parents to make any contribution.
- 3.2 No charges will be made for:
 - 3.2.1 admission applications to any Excalibur academy;
 - 3.2.2 provision of books, equipment, materials or transport.
- 3.3 Exceptions are:
 - 3.3.1 a voluntary charge may be made for additional materials where parents have indicated in advance that the student will own the finished product and are able to take it home;
 - 3.3.2 the cost of travelling to and from home when students are on work experience. This cost is met by the parents;
 - 3.3.3 non-residential educational trips that take place substantially (50% or more) during the school day. A contribution towards the costs will be requested but parents are under no obligation to contribute;
 - 3.3.4 instrumental or vocal tuition unless the tuition is provided at the request of the pupil's parent;



- 3.3.5 anything required as part of the specification for a prescribed public examination;
- 3.3.6 examination entry fees for public examinations for which registered students are being prepared at the academy;
- 3.3.7 examination re-sits for which registered students are being prepared at the academy.

4. Activities and Resources that incur charges

4.1 Charges will be made for:

- 4.1.1 **Musical instrument tuition.** The instrument tuition fees charged constitute a private arrangement between the tutor and the student. As such, fees are payable to the tutor direct and no charges are made by the school. Where the Local Authority Music Service is used then an invoice will be raised against parents to cover that cost.
- 4.1.2 **Public examinations.** If a student, parent or guardian requests a re-mark, re-sit or a copy of an examination script, an amount may be charged to the parent to cover costs. This amount shall correspond to any relevant fee levied to the academy by the examining body plus a small administration fee (of £5-£10) to cover costs.
- 4.1.3 All normal costs associated with prescribed public examinations are borne by the academy. This includes any costs associated with re-marks and re-sits where the academy has requested that these take place.
- 4.1.4 Charges may be made if a student fails to meet the requirements of the examination without good reason.
- 4.1.5 **Residential trips.** The board and lodging element of residential trips will always be charged for, irrespective of whether the trip has occurred within the school day or not, or whether the trip has taken place to fulfil the requirements of the curriculum or syllabus. If more than half the trip takes place outside of school hours, the remaining costs will be charged for in full.
- 4.1.6 Students who are entitled to Free School Meals are exempt from paying for the board and lodging element of the trip.
- 4.1.7 **School uniform.** The cost of compulsory school uniform where payment is made through the school will be levied at the cost incurred by the academy plus a small administration charge.
- 4.1.8 **Cost of damages.** These include any damages to the fabric of the academy premises (such as a broken window) and the defacing, loss or breakage of books or classroom equipment. In such cases, especially where the damage is due to unacceptable behaviour on the part of the student, parents will be asked to pay the cost of repair or replacement. Such charges may be reduced or waived on an individual



basis if this is deemed to be appropriate on educational grounds, for example, in circumstances where a student has owned up to a misdemeanour or the damage was accidental.

- 4.1.9 **Early Years Provision.** Charges will be made for sessions not covered by the 15 Hours Early Years Entitlement or extended 30 hours where applicable.
- 4.1.10 **Breakfast Clubs, After School Clubs and Holiday Clubs.** Charges will be made for after school clubs if it is run by an external instructor or club; and / or additional staffing or resources are required to run the activity.
- 4.1.11 **Materials, books, uniform and equipment.** When parents indicate they wish students to retain ownership of resources a charge may be levied. Sixth Form students will be provided with details regarding reading lists, textbooks, equipment and field trips prior to starting their courses.
- 4.1.12 **School Meals (except for pupils entitled to free school meals).** School meals will be provided at reasonable cost.
- 4.1.13 **Lockers.** Some schools may charge for the provision of lockers.

5. Voluntary Contributions

- 5.1 Each Excalibur Academy can ask for voluntary contributions to subsidise particular activities or for a non-specified purpose that will benefit the students at the academy. These contributions are purely voluntary and a student will not be excluded from any activity because parents have not contributed.
- 5.2 Examples of requests for voluntary contributions include swimming fees, contributions to materials in DT & Art, day trips, theatre visits, visiting speakers, and residential trips taking place mostly in school time.
- 5.3 Certain activities, particularly school trips, need to be funded through voluntary contributions if they are to be financially viable. If the activity cannot be funded without voluntary contributions and not enough voluntary contributions are made the activity / trip may be cancelled.
- 5.4 There is no obligation on parents to make a contribution. Students will not be excluded from the specific trip or any activity due to their parents/guardian/carer being either unable or unwilling to pay.

6. Non-Specific Donations and Contributions from Parents

Individual academies may ask for contributions to a general fund. These funds will be ring fenced and used for additional opportunities for students. Schools will decide locally how to spend the money. Schools will inform parents how these funds are used.



7. Remission of Charges

- 7.1 If a residential, curriculum-based activity takes place largely during academy time, a remission of charges for board and lodging is available for students who are entitled to Free School Meals.
- 7.2 At individual academies, students who are entitled to Free School Meals or Pupil Premium may benefit from financial assistance for the compulsory elements of school uniform. Parents should contact their school for more information.
- 7.3 Individual academies will financially support families. Parents should write to the Principal requesting support. All requests will be treated sympathetically and in confidence.

8. Additional Financial Support

- 8.1 Individual academies may partially or fully subsidise trips and opportunities using school funds.
- 8.2 Parents and students are encouraged to access funding that will support them. Local Trust Funds, The Rotary Club and Lions often will support individuals.
- 8.3 Parents can write in confidence to Academy Principals to apply for financial support. All requests will be dealt with in strictest confidence.
- 8.4 No financial support will be made to contribute towards the cost of transport to or from school.
- 8.5 Sixth Form students from low income families may be entitled to support from the Sixth Form Bursary Fund.

9. Calculating Charges & Refunds

- 9.1 All charges and requests for voluntary contributions will be calculated on a break-even basis. Charges will not include subsidies for pupils whose parents do not pay.
- 9.2 Occasionally once all the expenses have been paid, a trip may have a surplus. If the surplus is greater than £10 per pupil on a day trip or £15 per pupil on a residential trip it will automatically be refunded to parents.



Appendix A

Communication with parents regarding Voluntary Contributions for Trips and Activities

Where charges are not made but contributions need to be requested to ensure financial viability of the trip or activity, information sent out to parents should include a form of words such as:

Trips in School Day

"In order that the trip may take place, it is necessary to ask for a voluntary contribution. There is no obligation to contribute, and no student in the group will be omitted from the trip if their parents do not contribute. It is true, however, that the trip will not take place if sufficient voluntary contributions are not forthcoming, as there is no other source of funding for the trip. In case of financial hardship, support may be available and a letter to the Principal will be dealt with confidentially and sympathetically"

Years R to 11 (Trips Outside of the School Day) & Nursery/Preschool & Years 12 & 13 (All Trips)

"In order that the trip may take place it is necessary to ask for a contribution. In cases of financial hardship, support may be available and a letter to the Principal will be dealt with confidentially and sympathetically"

"Under the Education Reform Act some of the costs involved with this trip are voluntary, however I have to emphasise that this visit cannot go ahead unless parents are willing to make a contribution of £xxx. By making the deposit payment of £xxx you are agreeing to make the full contribution of £xxx."