



Charging, Refunds and Remissions Policy

Date policy adopted: 20th March 2024

Due for review: Spring 2026

The Board of Trustees has resolved to make charges as allowed by sections 449-462 of the Education Act 1996

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1.0 Confirmation that the Charging, Refunds and Remissions Policy in respect of The Learning Partnership Trust has been discussed and formally adopted by the Board of Trustees

Signed by:

Chair of Trustees: Date:

Print name Diane Hancock

2.0 CHARGING POLICY

The Academy Trust aims to have a clear, robust process in place for charging, refunds, and remissions; this policy clearly sets out the activities that are chargeable, when charges will and will not be made, the management of refunds and the process for claiming remission.

The Board of Trustees has overall responsibility for approving and monitoring the implementation of this policy but can delegate to a sub-committee according to their terms of reference and the school's financial regulations.

The headteacher is responsible for ensuring all staff are familiar with the content of this policy and that it is being applied consistently.

Staff are responsible for implementing this policy and notifying the headteacher of any specific circumstances where they are unsure of that implementation.

Definitions

Charge: the fee payable for a specifically defined activity

Refund: the return of monies previously paid for a specifically defined activity

Remission: the cancellation of / exemption from a charge that would normally be payable

2.1 School Meals

The charge for a school meal will be set annually by the Headteacher 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 will be chargeable, parents/carers are expected to make prompt payment. Where payments are not made in advance of the meal being taken, parents/carers will be reminded of their debt by letter in accordance with the Dinner Money Debt Recovery Policy.

There is no charge for pupils who are entitled to free school meals or universal infant free school meals.

2.2 Educational visits:

The academy:

- will seek voluntary contributions from parents/carers where applicable
- will not exclude a child from participating in an activity during the school day on financial grounds

Where 10% or more of parents'/carers' decline to make the requested voluntary contribution (their identity will remain confidential), or the contributions shortfall is £50 or more, then the visit or activity may not take place and is subject to the Headteacher's decision.

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.

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 it takes place during school hours
 - parents / carers will be 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
- costs of overnight allowances and mileage allowance for staff attending residential trips
- full cost recovery for residential activities that take place outside of school hours

NB> The academy will subsidise the cost of any residential trip for children of families claiming free school meals following a confidential request from the family.

No charge applies:

- where parents/carers 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 academy's curriculum

2.4 Music Tuition

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

Music fee arrangements are made directly between the parent/carer and specialist tutors/music lesson providers. Before entering any agreements parents/carers are encouraged to establish the refund policy i.e. whether a refund is due if the pupil cannot attend due to illness or absence due to a school related activity e.g. trip, sporting event, statutory exam etc. However, in order to ensure equal opportunities for all pupils, charges for music tuition within school hours for pupils eligible for free school meals or children in care will be considered for remission in accordance with this policy (see remissions section).

3.0 Extra-curricular activities:

3.1 Curriculum related clubs

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 will not exceed the actual costs incurred in the provision of the activity and will be set by the Headteacher in consultation with the CFO.

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

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

3.2 Breakfast Club (applicable to Takeley Primary School only)

- charges apply in accordance with the rules laid down in the academy's separate Breakfast Club agreement, which must be signed by parents/carers before their child is left in the care of breakfast club staff

4.0 Other areas

Charges apply:

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

No charge applies:

- 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 academies/schools
- for syllabus for a public examination that the pupil is being prepared for by the academy

- for academy's basic religious education syllabus
- for admissions.

5.0 Voluntary contributions

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

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

6.0 DBS checks

The academy will cover the cost of DBS checks for all employed staff.

The academy will cover the cost of DBS checks for volunteers.

7.0 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 will be retained to be used for future meals.
- If the academy has to cancel meal provision for a short time, the income received in advance will be recorded against each individual pupil to be used to cover future meals; where that amount exceeds £30 for any one pupil, the parent/carer may request a refund.
- When a pupil leaves the academy and income has been received but meals not taken, the parent/carer is entitled to request a refund where the figure exceeds £10, lesser amounts will be retained in academy funds.

7.2 Educational visits

- When a pupil is absent due to illness and does not attend an educational visit, the transport/entrance cost will not be refunded, where already committed. However, where possible, the academy will endeavour to recover costs related to that activity and, if successful, will then refund the parent/carer.
- If a trip has to be cancelled by the academy, parental/carer contributions will be refunded, less any initial deposits withheld by the venue.

- Where contributions for an activity exceed the final total cost by more than £5 per pupil, a refund will be given. Excess income less than £5 per pupil will be retained in academy funds. Excess expenditure will be paid from academy funds.

7.3 Residential activities

- If a pupil does not attend a residential activity due to illness, the academy will endeavour to recover costs, through the trip insurance and, if successful, will then pass this refund onto the parent/carer; please note that initial deposits may be retained by the travel company.
- Where a residential trip is cancelled by the travel company, the academy will endeavour to recover full refunds which, upon receipt, will be passed onto the parents/carers.
- Where a residential trip is cancelled by the academy, parental/carer contributions already received will be refunded, less any initial deposits withheld by the venue.

7.4 Extra-curricular activities (where payment is made to the academy)

- If a pupil does not attend an activity due to illness, no refund applies.
- Where curriculum related clubs are cancelled by the academy, the income received will be 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.

7.5 Outside of school hours' activities where payment is made directly to the school - not part of the curriculum, or public examination syllabus or part of the academy's basic religious education

- If a pupil does not attend an activity due to illness, no refund applies.
- Where the activity is cancelled by the academy, the income received will be 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 academy but has been cancelled by external organisers/tutors/sports coaches, the academy will endeavour to obtain refunds which, upon receipt, will be 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.

7.6 Breakfast Clubs

Refunds are in accordance with the rules laid down in the separate Breakfast Club agreement.

8.0 REMISSIONS POLICY

The Headteacher and Chair of Trustees will authorise the remission of charges in all cases.

The academy will consider the remission of charges to parents or carers who receive the relevant support payments (in accordance with the current DfE listing) which make their child/children eligible for free school meals and for children in care.

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

The academy may decide to subsidise part or all of the payment of some charges for certain activities and pupils; each event or case will be considered individually by the Headteacher.