LORETO GRAMMAR SCHOOL

CHARGING AND REMISSIONS POLICY

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Owner of policy	Headteacher
Approved by	Finance and Premises Committee
Reviewed and prepared by	Loreto Finance Department
Location of policy	Loreto Grammar School Website

STATEMENT OF INTENT

Loreto Grammar School is committed to ensuring equal opportunities for all students, regardless of financial circumstances, and has established the following policy and procedures to ensure that our offering of school trips, activities and educational extras do not discriminate against any student, parent/carer or other stakeholder.

In addition, we are committed to adhering to legal requirements regarding charging for school activities, meeting all statutory guidance provided by the DfE and to the following:

- Not to charge for education provided during school hours
- To inform parents/carers on low incomes and/or in receipt of relevant benefits of the support available to them when asking for contributions.

1. Legal framework

This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:

- Education Act 1996
- Children Act 1989
- The Charges for Music Tuition (England) Regulations 2007
- The Education (Prescribed Public Examinations) (England) Regulations 2010
- Freedom of Information Act 2000
- DfE (2018) 'Charging for school activities'
- DfE (2020) 'Governance handbook'
- The academy's Funding Agreement
- ESFA current 'Academy trust handbook' (ATH)

Where an issue arises that is not specifically dealt with within this policy, decisions will be made which are in line with the spirit of the policy and of the sources detailed above.

Definitions:

- Charge – a fee payable for specifically defined activities
- Remission – the cancellation of a charge which would normally be payable

This policy does not apply to Loreto Learning and Support income or to music tuition provided by an external teacher i.e. not employed by Loreto Grammar School.

2. Activities for which charges are not permitted:

- An admission application;
- 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, or part of a syllabus for a prescribed public examination that the student is being prepared for at the school, or part of religious education;
- Education provided on any residential visit that takes place during school hours;

- Education provided on any residential visit that takes place outside school hours if it is part of the national curriculum, or part of a syllabus for a prescribed public examination that the student is being prepared for at the school, or part of religious education.
- Instrumental or vocal tuition, for students learning individually or in groups, unless the tuition is provided at the request of the student's parent;
- Entry for a prescribed public examination, if the student has been prepared for it at the school
- Examination re-sit(s) if the student is being prepared for the re-sit(s) at the school

3. Activities for which charges are permitted:

- Materials, books, instruments, equipment or ingredients, optional clothing (e.g. leavers / trip hoodies) where the student will own them or where the student will own the finished product.
  NB Students in receipt of Pupil Premium or the 16-19 Bursary will be issued with Revision Guides and other educational resources at no cost where the student will own them or where the student will own the finished product.
- Instruments purchased under the Assisted Instrument Purchase Scheme
- The full cost of activities which take place wholly or mainly outside school hours, which is not:
  - Part of the national curriculum
  - Part of a syllabus for a prescribed public examination that the student is being prepared for at the school
  - Part of Religious education
- The full cost of board and lodging on a residential visit (parents will be exempt from paying board and lodging costs if they are in receipt of Free School Meals).
- Transport - see section 5 for details.
- Music tuition - see section 6 for details.
- Optional tuition (outside of the normal school day), examinations & examination re-sits at the request of a parent/carer - see section 7 for details.
- Extended day services offered to students, for example breakfast club, after-school clubs, tea and supervised homework sessions).
- The school may charge parents/carers for the cost of repair or replacement of items broken, damaged or lost (including any IT equipment provided through Loreto, see section 8 for details), due to their child's behaviour.
- Use of facilities for anything other than education of the students at Loreto Grammar School.

When calculating the cost of the above, an amount may be included in relation to the following:

- Any materials, books, instruments, equipment or other resources provided in relation to the item
- The cost of buildings and accommodation
- The cost of employing non-teaching staff (including teaching assistants)
- The cost of teaching staff (including supply teachers) under contracts for services purely to provide the item
- An administration fee, usually 5% of the cost, to cover all administration and online payment transaction processing fees
- The school will not charge in excess of the actual cost (including overheads and administration fees) of providing optional extras divided by the number of participating students. We will not charge a subsidy for any students wishing to participate but whose parents are unwilling or unable to pay the full charge. If a proportion of the activity takes place during school hours, a charge will not be made for the cost of alternative provision for those not participating.

- A reasonable contingency

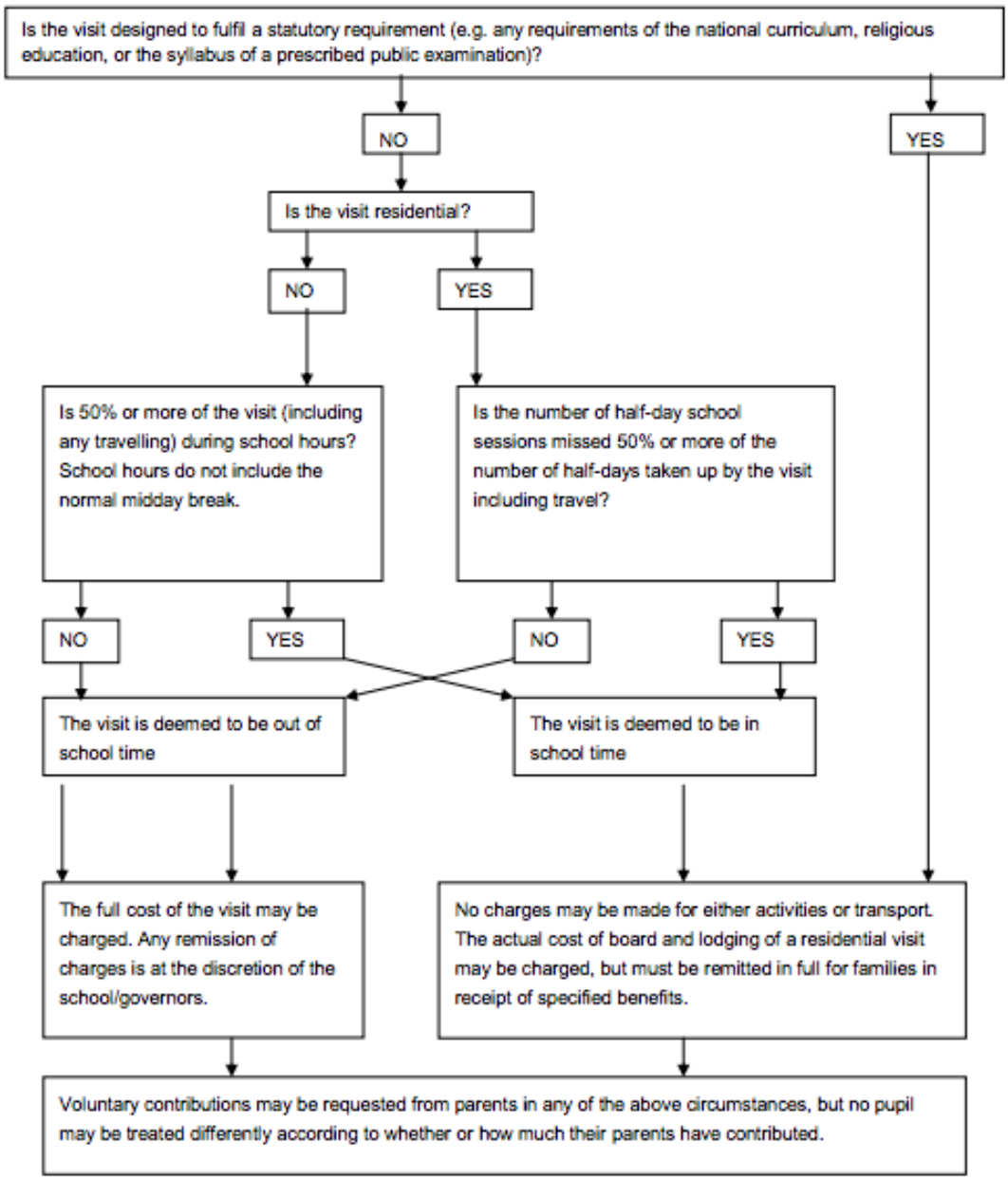
Participation in any optional activity will be on the basis of parental choice and a willingness to meet the charges; therefore, parental agreement is a prerequisite for the provision of an optional extra where charges will be made.

4. Trips

The school will make it clear that places on oversubscribed school visits are selected randomly although the Headteacher has the discretion to prioritise places for students who have been unsuccessful in previous draws.

Trip Organisation Flow Chart

This flowchart, from Learning Outside the Classroom, provides detailed advice on charging for school trips:-



4.1 Curriculum Trips - compulsory part of your child's course

Loreto cannot charge for a curriculum trip, but may ask for voluntary contributions when the activity is part of the national curriculum, part of a syllabus for a prescribed public examination that the student is being prepared for at the school, or part of religious education.

The trip letter will state "No student will be excluded from the activity or treated differently because they do not make a contribution. If voluntary contributions are not sufficient then it may be that the planned activity or trip cannot go ahead. By giving consent for your child to attend this trip we will assume that the full amount of the voluntary contribution will be paid unless we hear from you to the contrary".

4.2 Optional Extra Trip – during school hours

When 50 % or more of the time spent on an activity occurs during school hours it is deemed to take place during school hours and Loreto cannot charge, but may ask for voluntary contributions.

The trip letter will state "No student will be excluded from the activity or treated differently because they do not make a contribution. If voluntary contributions are not sufficient then it may be that the planned activity or trip cannot go ahead. By giving consent for your child to attend this trip we will assume that the full amount of the voluntary contribution will be paid unless we hear from you to the contrary".

4.3 Optional Extra Trip – outside of school hours

Loreto can charge for the activity when less than 50% of the time spent on an activity occurs during school hours as it is deemed to have taken place outside school hours. Loreto will charge the full cost of the trip including the contingency and school administration costs (see section 3 above). Loreto reserves the right to remove a student from a trip where payment has not been made in full.

4.4 Residential School Trips – during school hours

When the activity is during school hours, Loreto cannot charge, but may ask for voluntary contributions towards the cost of the trip other than the board and lodgings. Loreto can charge for the board and lodging element of all residential school trips; the charge will not exceed the actual cost. Parents will be exempt from paying board and lodging costs if they are in receipt of Free School Meals.

A residential visit is deemed during school hours if the number of school sessions are 50% or more than the total number of half days spent on the trip (a half day means any period of 12 hours ending with noon or midnight on a day) E.g. students are away from noon on Wednesday to 9pm on Sunday. This counts as 9 half day sessions including 5 school sessions so is deemed to be during school hours.

The trip letter will state "As this trip is a residential trip the board and lodging element of the cost is fully chargeable and by giving consent for your child to attend, we will assume that the full amount of the voluntary contribution and chargeable cost will be paid, unless we hear from you to the contrary. (If your daughter is in receipt of free school meals you will be entitled to a rebate in respect of board & lodging)".

4.5 Non-educational Residential School Trips – outside of school hours

A residential visit is deemed outside school hours if the number of school sessions are less than 50% of the total number of half days spent on the trip (a half day means any period of 12 hours ending with noon or midnight on a day). E.g. students are away from school from noon on Thursday until 9pm on Sunday. This counts as 7 half days including 3 school sessions so is deemed to be outside of school hours. Loreto will charge the full cost of the trip including a contingency and school administration costs (see section 3 above). Loreto reserves the right to remove a student from a trip where payment has not been made.

5. Transport

Loreto Grammar School has been granted Section 19 permits for each of the school minibuses and this allows the school to set contributions and charges at a level to cover the costs of running the vehicle, including an allowance for vehicle depreciation and drivers' costs but not to make a profit. The permits do not allow the vehicles to be used to carry members of the public for hire or reward so the minibuses cannot be charged out to other organisations.

The school cannot charge for, but may request a voluntary contribution towards:

- Transporting registered students to or from the school premises, where the Local Authority has a statutory obligation to provide the transport.
- Transporting registered students to other premises where the governing board or Local Authority has arranged for students to be educated.
- Transporting students to meet an examination requirement when they have been prepared for the examination at the school.
- Transport provided for an educational visit.

6. Music tuition

Music tuition can be charged for where the provision of tuition in singing or playing a musical instrument during school hours (whether provided individually or to a group of any size) is made at the request of the student's parent. Charges cannot exceed the cost of the provision.

Music tuition cannot be charged when tuition is provided following a duty imposed by section 88 of the Education Act 2002 (implementation of National Curriculum for England).

No charge may be made for individual music tuition provided in school hours in respect of a student who is looked after by the local authority (within the meaning of section 22(1) of the Children Act 1989).

This policy does not apply to music tuition provided by an external teacher i.e. not employed by Loreto Grammar School.

7. Examinations and Resits

The school may charge for examination fees if:

- The examination is on the set list (which includes SATs, GCSEs and A-levels), but the student was not prepared for it at the school.
- The examination is not on the set list, but the school arranged for the student to take it. This includes optional language examinations where tuition is provided at school as an optional extra, outside of the normal school day. In this instance, Loreto will charge for the tuition, examinations and administration fees.
- A student fails, without good reason, to complete the requirements of any public examination where the governing board or Local Authority originally paid or agreed to pay the entry fee.
- A student is entered for a second or subsequent attempt at an examination Loreto will pay the fee, however if the re-sit is at the request of the parent/carer the fee must be paid by them. Once students have left the school, re-sits must be taken at the school.

- A student or their parent/carer requests a copy of an examination script, an examination is re-marked, appealed or an examination re-sit. If the awarding body changes the overall grade of the result, the awarding body will not charge the school and we will issue a refund net of the administration fee.

The amount charged will correspond to any relevant fee levied to the school by the examining body, any additional invigilation costs, plus an administration fee, of £5, for **each** paper. There may be multiple papers per exam.

Loreto reserves the right to amend the administration fee levied if the system changes considerably before the next policy review date and any change will be approved by the Headteacher.

If certificates are posted to the student, a charge will be made to cover postage fees incurred.

Loreto reserves the right to withhold exam certification until charges are paid.

8. Provision of IT and other equipment to students

Any IT equipment provided to students through Loreto Grammar School or other awarding body will remain the property of Loreto Grammar School and be subject to the student and parent/carer signing a loan agreement and the Loreto Acceptable Use Agreement.

When the student leaves Loreto Grammar School, they must return any equipment borrowed in the original state and condition, allowing for normal wear and tear. The parent/carer is liable and will be charged for any loss or damage of the equipment borrowed.

9. Refunds

9.1 Trip Refunds

Initial deposits for school trips will be non-refundable unless otherwise stated and parents will be informed of this when they are provided with initial information about the trip.

The school will make it clear that places on oversubscribed school visits are selected randomly although the Headteacher has the discretion to prioritise places for students who have been unsuccessful in previous draws. A full refund will be made if a student is not successful in gaining a place on a trip.

In the event that the school has to cancel a trip due to foreseen circumstances, parental contributions will be refunded. In the event that a school trip is cancelled by a party other than the school due to unforeseen circumstances, it is at the school's discretion as to whether a refund is given to parents.

In the event that a student or their parents cancel the student's place on a trip, it will be at the school's discretion as to whether a refund is given. The school will take into account the reason for cancellation, whether the school will be reimbursed for the student's place on the trip, and whether the place on the trip can be offered to another student.

In the event that a student cannot attend a trip at the last minute, e.g. due to illness, it will be at the school's discretion as to whether a refund is given. The school will take into account whether the school can be reimbursed for the student's place on the trip, whether the place on the trip can be offered to another student or if an insurance refund can be claimed.

In the event that a school trip is postponed or cancelled due to unforeseen circumstances, it will be at the school's discretion as to what happens with the parental contributions for the trip. The school will consider its

options, which could include carrying forward the money until the trip takes place, transferring the money to another trip or refunding parents.

Once a trip has taken place, a refund will be offered where the excess is greater than £25 per student, net of up to 7% of the trip cost to cover administrative costs incurred to ensure protection of the education budget.

The school will deal with cancellations and refunds on a case-by-case basis, ensuring that all students and their families are treated equally.

Refunds below £25 will not usually be made and any funds will be used for the benefit of all students at the school.

All trips are insured through the government-backed RPA (Risk Protection Arrangement), however this only covers costs external to Loreto.

9.2 Other refunds

Any other refunds will be dealt with on a case by case basis and approved by the Headteacher.

Refunds below £25 will not usually be made and any funds will be used for the benefit of the school.

10. Voluntary Contributions

We may ask for voluntary contributions towards the benefit of the school or school activities. If an activity cannot be funded without voluntary contributions, we will make this clear to parents at the outset. We will also make it clear that there is no obligation for parents to make a contribution, and notify parents whether assistance is available.

No student will be excluded from an activity simply because their parents are unwilling or unable to pay. If a parent is unwilling or unable to pay, their child will still be given an equal opportunity to take part in the activity. However, if insufficient voluntary contributions are raised to fund an activity, and the school cannot fund it via another source, the activity will be cancelled.

We will strive to ensure that parents do not feel pressurised into making voluntary contributions.

Where voluntary contributions need to be requested to ensure financial viability of the trip or activity, information sent out to parents will include the following statement:

“No student will be excluded from the activity or treated differently because they do not make a contribution, however if voluntary contributions are not sufficient then it may be that the planned activity or trip cannot go ahead. By giving consent for your child to attend this trip we will assume that the full amount of the voluntary contribution will be paid unless we hear from you to the contrary”.

The school may communicate information about voluntary contributions on behalf of The Loreto Grammar School Trust, set up to advance education at the school.

The Governing Body wish to continue to offer students as wide a range of opportunities as possible and hope that parents, where possible, look sympathetically on requests for voluntary contributions.

11. Remissions

- In exceptional circumstances, the Pupil Premium grant may be used to support families in financial difficulty with visits/activities subject to the approval of the Headteacher and there is no guarantee that

all requests can be met. Assistance will be allocated on a needs basis, and if the full cost of the trip/activity cannot be met through assistance funding and voluntary contributions, the trip/activity will be cancelled.

- Students in receipt of Pupil Premium will be issued with Revision Guides and other educational resources at no cost where the student will own them or where the student will own the finished product.
- The Headteacher, Finance committee or Governing Body may remit in full or part, charges in respect of a student, if they consider it reasonable in the circumstances.
- The Headteacher, Finance committee or Governing Body may decide not to levy charges in respect of a particular activity, if they consider it reasonable in the circumstances.

12. Lettings

The school currently does not have significant lettings. In the event of Loreto making its facilities available to outside users a charge is made for at least the cost of providing the facilities and to cover our overheads. Any charges will be approved by the Headteacher.

13. Income generation

In line with the ESFA's Academy Trust Handbook, the trust will set fees for chargeable services at full cost and reserves the right to apply an additional rate of return when in a commercial environment.

The Headteacher, Finance Committee or Governing Body may levy charges for miscellaneous services up to the cost of providing such services and related administration costs.