





FURNESS
ACADEMY

Charging and Remissions Policy

(Ref: A1)

Approved by Governing Body			
Committee	Name	Signature	Date
Chair of the Board of Governors			13/9/16
Headteacher			09/16

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Responsible for policy/document	Business Director
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1.0 Introduction

Furness Academy recognises the valuable contribution that a wide range of extra-curricular activities, including trips, clubs and residential experiences can make towards the education of our young people and aims to promote and provide such activities both as part of a broad and balanced curriculum for pupils and as additional optional enrichment activities.

Furness Academy strives to ensure that all young people have an equal opportunity to benefit from such activities, both on and off site and within and outside of the curriculum, regardless of their family's financial means. To ensure transparency in setting charges and also to ensure all young people are able to access all of the provision we offer, this Policy sets out our approach to charging and remissions. It has been informed by adherence to the law and by following national government guidance.

An Academy session is equivalent to half a day i.e. either one morning session before lunch or one afternoon session afterwards.

Where this Policy refers to parents we mean any person with parental responsibility for a child or young person.

This Policy does not apply to charges made and determined by other organisations offering activities and services on the Academy premises.

2.0 Admissions

No charge will be made for any aspect of the admissions process to this Academy.

3.0 Activities wholly during the Academy day

- 3.1 No charge will be made for education provided during normal Academy hours. This includes all activities related to the National Curriculum and religious education as well as the materials, equipment and transport required to provide it. Music Tuition which is not part of the Academy curriculum is covered under point 8 below.
- 3.2 We recognise that the definition of 'part of the National Curriculum' is not limited to learning outside the classroom experiences required as part of a specific subject e.g. geography or science fieldwork, but also includes activities designed to fulfil requirements under the National Curriculum 'inclusion statement' and others as applicable.
- 3.3 No charge will be made for entry to a prescribed public examination if the pupil has been prepared for it at this Academy.
- 3.4 No charge will be made for examination re-sits, if applicable, if the pupil has been prepared for the re-sit at this Academy.
- 3.5 A charge will be made to cover the cost of ingredients or materials where parents have confirmed in advance that they wish their child to own the finished product.
- 3.6 This Academy offers pupils the opportunity to have their own copies of textbooks, specialist art materials etc. as desired. A charge will be made for any educational materials that parents have confirmed in advance that they wish their child to own. No young person will be disadvantaged if they do not or cannot take up the opportunity.

3.7 We will ask parents for voluntary contributions to help the Academy fund the range of these opportunities we offer, but no young person will be excluded from an activity on the basis of a parent's inability or unwillingness to pay this contribution. The Governing Body reserves the right, however, to cancel an activity in its entirety if insufficient voluntary contributions are received.

3.8 From time to time we may invite a non-Academy based organisation to deliver an activity during the Academy day. Such organisations may wish to charge parents, who are entitled not to pay any fee and instead to ask the Head teacher to agree to their child being absent/taught elsewhere in the Academy for that period. In many cases, however, parents will be asked for a voluntary contribution towards the cost of the activity.

4.0 Activities wholly outside of the Academy day

- We will ask parents for voluntary contributions to help the Academy fund the range of these opportunities we offer, but no young person will be excluded from an activity on the basis of a parent's inability or unwillingness to pay this contribution. The Governing Body reserves the right, however, to cancel an activity in its entirety if insufficient voluntary contributions are received.
- Lunchtime and after Academy clubs and activities are wholly outside of Academy hours and do not fall under the definition of education above. Please see Point 7 Optional Extras.

5.0 Non-residential activities that take place partly during and partly outside of the Academy day

- Where the majority of time spent on a non-residential activity is *within* normal Academy hours, the charging regime will be as if it happens *fully within* Academy hours.
- Where the majority of the time spent on a non-residential activity is *outside* of normal Academy hours, the charging regime will be as if it happens *fully outside* Academy hours i.e. the activity becomes an 'Optional Extra'.

6.0 Residential Activities

6.1 A charge will be made to the parents of pupils who wish to participate in residential activities for the cost of board and lodging with the exception of those in receipt of Income Support, Income based Jobseeker's Allowance, Support under Part VI of the Immigration and Asylum Act 1999, Child Tax Credit (with provisions), the guarantee element of State Pension Credit and/or an income and support allowance that was introduced on 27 October 2008.

6.2 Other charges will be made to cover associated costs only where the number of normal Academy sessions (defined in the Introduction) missed by the pupils taking part totals half or more of the number of half-days taken up by the activity. In such cases, parents will be told how the charges were calculated.

6.3 In order to cover any other costs associated with a residential visit e.g. activity tuition, for which charges cannot be made, parents will be asked to make a voluntary contribution. No child will be denied the opportunity of attending a residential if the parents do not wish to or cannot contribute voluntarily, however it is possible that unless sufficient voluntary contributions are received to cover the cost, the experience will not go ahead. The Governing Body reserves the right to cancel an activity in its entirety if insufficient voluntary contributions are received.

7.0 Optional Extras

7.1 The Governing Body reserves the right to charge parents for activities deemed to be optional extras. Such activities will include, for example, a visit to the Theatre unless it is part of a national curriculum subject area.

7.2 Lunchtime and after Academy activity clubs do not operate during normal Academy hours and to cover the costs of offering such opportunities a charge may be made to the parents of pupils who wish to participate in them. Families on a low income who are unable to pay such charges should speak to **the Headteacher** in complete confidence.

7.3 In calculating the cost of optional extras, an amount may be included in relation to:

- Any materials, books, instruments, or equipment provided in connection with the optional extra;
- Non-teaching staff;
- Teaching staff engaged under contracts for services purely to provide an optional extra, this includes supply teachers engaged specifically to provide the optional extra; and
- The cost, or a proportion of the costs, for teaching staff employed to provide tuition in playing a musical instrument, where the tuition is an optional extra

8.0 Music Tuition

- No charge will be made for tuition for pupils learning to play musical instruments if the tuition is required as part of the National Curriculum or part of a syllabus for a prescribed public examination that the pupil is being prepared for at this Academy, or forms part of religious education
- A charge will be made for vocal and musical instrument tuition for either an individual pupil or groups of any appropriate size, where it does not fall into the category of teaching described above.

9.0 Before and/or After Academy Care

Charges will be made for any services offered to pupils before Academy, after Academy and during Academy holidays, with the level of fees and any remissions to be set and reviewed regularly by the Governing Body or individual service provider e.g. Summer School.

10.0 Damage to Property and Breakages

The Academy will attempt to recover some or all of the costs incurred repairing willful damage or breakage of Academy property or willful damage or breakage of property belonging to a third party where the Academy has been charged. The actual amount will be determined by the Headteacher.

11.0 Community use of Facilities

The Academy may arrange to let its premises, facilities etc. to members of the local community, as specified in the Academy Lettings Policy.

12.0 Calculating Charges

- When charges are made for any activity, whether during or outside of the Academy day, they will be based on the actual costs incurred, divided by the total number of pupils participating. There will be no levy on those who can pay to support those who can't. Support for cases of hardship will come through voluntary contributions and fundraising.
- Parents who would qualify for support are those who in receipt of Income Support, Income based Jobseeker's Allowance, Support under part VI of the Immigration and Asylum Act 1999, Child Tax Credit (with provisions), the guarantee element of State Pension Credit and/or an income and support allowance that was introduced on 27 October 2008.
- The principles of best value will be applied when planning activities that incur costs to the Academy and/or charges to parents.

13.0 Debt Recovery

- The Governing Body authorise the Academy to take all reasonable measures to collect debts as part of its management of public funds. In doing so, it will observe the relevant financial regulations and any other legal requirements.
- Staff will follow set Academy procedures to secure the collection of all debts. A debt will be written off only after all reasonable measures (commensurate with the size and nature of the debt) have been taken to recover it. Only debts below that allowed for in the annual funding letter issued by the Secretary of State may be written off. The recovery of any sums above this amount will be referred first to the Governors and then to the Secretary of State for approval. If any debtor has a number of debts that together exceed the write-off limit then these will be treated as a total amount.
- Unless a decision to write-off a debt is demonstrably a reasonable course of action authorisation is in place to initiate legal or other action to recover debts.

14. Arrangements for Monitoring and Evaluation

The Resources Committee of the Governing Body will monitor the impact of this policy by receiving on a termly basis, a financial report on those activities that resulted in charges being levied, the subsidies awarded (without giving names) and the source of those subsidies.

Appendix
Department for Education
Frequently asked questions

Q. What is a charging policy?

A. Under the charging provisions set out in legislation, governing bodies and local authorities of state funded Academies may choose to charge for certain defined activities, but only if they have first drawn up charging and remissions policies. These policies should be made available to parents on request.

Q. How does this relate to academies?

A. Academies (including free Academies, studio Academies and university technical colleges) are required through their funding agreements to comply with the law on charging for Academy activities.

Q. A visit involving staying overnight has been arranged for children at my Academy. Can the Academy charge for this?

A. Where Academy activity requires pupils to spend nights away from home, the Academy is allowed to make a charge for board and lodging. This is with the exception of pupils whose parents are receiving: Universal Credit; Income Support; Income based Jobseeker's Allowance; Support under part VI of the Immigration and Asylum Act 1999; or Child Tax Credit (providing that they do not also receive Working Tax Credit and have an annual income, assessed by the Inland Revenue that does not exceed £16,190 FY 13/14) and an income related employment and support allowance. Since April 2003 the eligibility criteria that entitle families to an exemption from paying for the cost of board and lodging on residential visits have been aligned with free Academy meals eligibility criteria. The head teacher must inform all parents of the right to claim free board and lodging if they are receiving these benefits.

Q. With regard to the remission of board and lodging payments, explain who pays for the expense? Would it come out of the Academy budget or is there a grant available to claim?

A. Although the criteria for being eligible for the remission of charges for board and lodgings is the same as free Academy meals, that is where the similarity ends. The costs involved in the remission of board and lodgings are to be borne by the Academy from their contingency funds. There is no return to be completed to reclaim the money back.

Q. Our Academy has a large number of pupils eligible for free Academy meals. This means that they would also receive remission for board and lodgings expenses for residential visits. How can the Academy fund/organise residential visits?

A. Government funding for Academies to each local authority recognises the different needs of each area. In terms of the allocation to Academies, each local authority sets a funding formula which is agreed with the local Academies forum. All local authorities are required to include an element in their formula to reflect the needs of deprived pupils. The amount that individual Academies receive from the local authority reflects their relative need compared with other local Academies. In addition, Academies receive pupil premium funding for disadvantaged pupils, based largely on those who are eligible for free Academy meals. This funding is provided by the government to raise the attainment of eligible pupils and narrow the attainment gap between eligible pupils and their peers. It is for head teachers and Academy governing bodies to decide how to use their formula funding and pupil premium allocation. Academies cannot exclude children from taking part in an activity that is part of the national curriculum purely on the grounds that the parent or carer cannot make, or refuses to make, a contribution. This can clearly place Academies in some difficulty on occasions where a number of parents/carers might be in such a position. The Academy then has to decide whether they can cover the costs of such activity from within the budget or by fundraising, or whether the activity has to be cancelled. If there is a residential activity taking place largely during Academy time, or which meets the requirements of the syllabus for a public examination, or is to do with the national curriculum or religious education, no charge may be made either for the education or for the cost of travel.

Q. Can governing bodies charge for educating children in maintained Academies and academies?

A. The local authority or governing body cannot charge for education that takes place in Academy hours. Nor can they charge for activities that take place outside Academy hours if these are part of the national curriculum, necessary as part of a syllabus for a prescribed public examination that the

pupil is being prepared for at the Academy, or part of religious education. They can charge for permitted 'optional extras', provided they have drawn up a statement of general policy on charging and given details of optional extras' they intend to charge for. The governing body's policy does not have to be the same as the local authority's policy, as long as it meets the requirements of the law.

- Q.** Can a Academy charge for an activity that takes place out of Academy hours?
- A.** This kind of activity is often referred to as an 'optional extra'. Where an optional extra is being provided, a charge can be made for providing materials, books, instruments, or equipment. See advice on optional extras on page 4. The actual charge for the optional extra cannot exceed the actual cost of the provision. Academies cannot and must not make a profit from charging for optional extras. Participation in any optional extra activity will be on the basis of parental choice and a willingness to meet the charges. Parental agreement is therefore a necessary pre-requisite for the provision of an optional extra where charges will be made.
- Q.** Can Academy ask parents for voluntary contributions?
- A.** Academies may invite parents and others to make voluntary contributions to make Academy funds go further. All requests to parents for voluntary contributions must make it clear that the contributions would be voluntary. It should be remembered that education provided during Academy hours must be free. This includes materials, equipment, and transport provided in Academy hours by the local authority or by the Academy to carry pupils between the Academy and an activity. Governing bodies should also clearly explain that children of parents who do not contribute will not be treated any differently, and that the activity might be cancelled if insufficient contributions are received.
- Q.** The Academy has sent letters out to parents asking for contributions towards a Academy visit, do parents have to pay?
- A.** Head teachers or governing bodies may ask parents for voluntary contributions towards the cost of: any activity which takes place during Academy hours; Academy equipment; and Academy funds generally. Children of parents who are unable, or unwilling, to contribute may not be discriminated against. However, if insufficient voluntary contributions are received to cover the cost of the visit, or activity, and there is no alternative method to make up the shortfall, then the Academy should cancel the activity/visit. It would be advisable to make parents aware of a possible cancellation to the activity/visit if insufficient voluntary contributions are received from the outset.
- Q.** Can a state boarding Academy make compulsory charges for day pupils?
- A.** State funded boarding Academies cannot charge for education during Academy hours. They may however charge for extended services offered to day pupils, but this must be optional. Compulsory charges must never be made for extended day services including breakfast clubs, after-Academy clubs, evening meal and supervised homework sessions whether the pupils take up these services or not. Many maintained Academies provide wraparound services but they are not part of the Academy day and it would be unlawful for state funded boarding Academies to make wraparound services compulsory.
- Q.** What happens if the Academy is not able to raise enough voluntary contributions to cover costs?
- A.** Where there are not enough voluntary contributions, and there is no way to make up the shortfall, for example Academy funds and/or fundraising activities, then it must be cancelled. The possibility of the activity/visit being cancelled due to a shortfall in contributions should be made clear in the information sent to parents.
- Q.** What if a parent is unable, or unwilling to make a voluntary contribution? How does this affect their child(ren)?
- A.** Academy cannot exclude a child from taking part in an activity that is part of the national curriculum purely on the grounds that the parent or carer cannot make, or refuses to make, a contribution. This can clearly place academies in some difficulty on occasions where a number of parents/carers might be in such a position. The Academy then has to decide whether they can cover the costs of such activity from within the budget or by fundraising, or whether the activity has to be cancelled.
- Q.** What support can a Academy offer a parent/carer who has difficulty making a financial contribution?
- A.** academies must ensure that parents in receipt of Universal Credit, Income Support, Income Based Jobseekers Allowance, support under part VI of the Immigration and Asylum Act 1999, Child Tax Credit, provided that Working Tax Credit is not also received and the family's income (as assessed by Her Majesty's Revenue and Customs) does not exceed £16,190 (Financial Year 2013/14) are aware of the support available to them when being asked for contributions toward the costs of

Academy visits. Some academies also have funds available to enable families in financial difficulty to send their children on visits/activities. Parents should be encouraged to speak to the head teacher in order to establish if such funding arrangements exist. No charge may be made if there is a residential activity taking place largely during Academy time, or which meets the requirements of the syllabus for a public examination. In addition, if the activity is to do with the national curriculum or religious education, no charge may be made either for the education or for the cost of travel for any pupil, not just those whose parents are in receipt of benefits.

Q. What about charges for transport during Academy hours?

A. Any transport provided by the Academy in Academy hours must be provided free of charge (though a voluntary contribution could be requested).

Q. Can the Academy charge for something like cooking ingredients or materials needed for a technology lesson?

A. Academy can make a charge to cover the costs of materials/ingredients for subjects such as design or food technology where parents have indicated in advance that they would like their child to bring home the finished product.

Q. Can the Academy charge entry fees for examinations?

A. An examination entry fee may be charged to parents if: the examination is on the set list, but the pupil was not prepared for it at the Academy; the examination is not on the set list but the Academy arranges for the pupil to take it; a pupil fails without good reason to complete the requirements of any public examination where the governing body or local authority originally paid or agreed to pay the entry fee.

Q. Can a Academy make a charge to pay for the administration required as part of the admission process?

A. Paragraph 1.9 (n) of the 'academies Admission Code 2012' rules out requests from admission authorities for financial contributions as any part of the admissions process. Legislation prevents state funded academies from charging fees for admission or for providing education during Academy hours.

Q. Can a Academy ask for a direct debit to the Academy fund?

A. No. A Academy may ask for voluntary contributions, as long as it is clear that they are voluntary, but we are clear that state education should be free and we have no intention of changing this policy. No contributions may be sought as part of the admissions process.

Q. Can a Academy ask parents to contribute to (or pay in full) the cost of a tablet or computer?

A. Sections 451 and 454 of the Education Act 1996 prohibits academies from charging for education and the supply of materials, books, instruments or other equipment (this would include tablets), during Academy hours. However, there is no prohibition on asking parents to make voluntary contributions. Additionally there is a specific exception in the legislation which enables academies to charge for materials where the pupil's parent wishes them to own the materials. All contribution requests to parents must make clear that the contributions are voluntary and that, if a parent cannot make or refuses to make a contribution, their children will not be treated any differently and will not be excluded from taking part in any activity or related equipment.

Q. What are community facilities?

A. academies are allowed to provide facilities that can be used by the local community, for example out-of hours/holiday childcare or swimming pool sessions. These facilities further any charitable purpose for the benefit of pupils at the Academy or their families, or people who live or work in the locality in which the Academy is situated. Academies should seek guidance from the Charity Commission if they are in doubt. Advice from the Charity Commission can be found here. Academies can charge for the use of these facilities, and a profit can also be generated, providing it is spent on the purposes of the Academy and or on community facilities. Maintained academies should check the local authority's published financial "scheme" for maintained academies in their area for any rules about the carry of profit from one financial year to the next. Academies should determine fees and charges in accordance with chapter 6 of HM Treasury's Managing Public Money the admissions process.