



WESTFIELD PRIMARY SCHOOL AND NURSERY

CHARGES, REMISSIONS AND REFUNDS POLICY

Date ratified: June 2023

Ratified by: FPP Committee

Date to be reviewed: June 2024

Introduction

The Governing Body recognises the valuable contribution that additional activities can make towards the children's personal and social education.

The Governing Body aims to promote and provide such activities both as part of a broad and balanced curriculum for the children of the school and as additional activities. We believe that all our pupils should have an equal opportunity to benefit from school activities and visits, independent of their parents' financial means.

The policy is based on advice from the Department for Education (DfE) on charging for school activities (May 2018) and the education Act 1996, sections 449-462 which set out the law in charging for school activities in maintained schools in England. The policy takes into account the school's equality policy.

In this policy the following definitions apply

- a charge means a fee payable for a particular item, service or activity;
- a remission means the cancellation of the charge that would otherwise be payable;
- a refund means repayment of some or all of the amount of the charge paid.

1. Circumstances in which charges will not be made

Education

- a) Admission applications
- b) Education provided during school hours (including the supply of any materials, books, instruments or other equipment)
- c) Education provided outside school hours if it is part of:
 - i. The national curriculum
 - ii. A syllabus for a prescribed public examination that the pupil is being prepared for at the school
 - iii. Religious education
 - iv. Instrumental or vocal tuition, for pupils learning individually or in groups, unless the tuition is provided at the request of the pupil's parent (see later)
- d) Entry for a prescribed public examination if the pupil has been prepared for it at the school
- e) Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school

Transport

- f) transporting registered pupils to or from the school premises, where the local education authority has a statutory obligation to provide transport;
- g) transporting registered pupils to other premises where the governing body or local authority has arranged for pupils to be educated;
- h) transport that enables a pupil to meet an examination requirement when he has been prepared for that examination at the school;

Residential visits

- i) Education provided on any visit that takes place during school hours

- j) Education provided on any visit that takes place outside school hours if it is part of the national curriculum, or part of religious education;
- k) Supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential visit.

2. Circumstances in which charges may be made

- a) Any materials, books, instruments, or equipment, where the child's parent wishes him/her to own them;
- b) Certain activities known as "optional extras" (see below);
- c) Board, lodging and activities that enhance the National Curriculum during residential visits;
- d) Certain early years provision;
- e) Community facilities.

Optional extras

Charges may be made for some activities that are known as 'optional extras'. Where an optional extra is being provided, a charge can be made for providing materials, books, instruments, or equipment.

Optional extras are:

- a) Education provided outside of school time that is not:
 - part of the national curriculum;
 - part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school; or
 - part of religious education.
 - b) Examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school;
 - c) Transport (other than transport that is required to take the pupil to school or to other premises where the local authority/governing body have arranged for the pupil to be provided with education);
 - d) Board, lodging and activities that enhance the National Curriculum for a pupil on a residential visit,
 - e) Extended day services offered to pupils (for example after-school clubs.).
- Participation in any optional extra activity will be on the basis of parental choice and a willingness and ability to meet the charges.

Any charge made in respect of individual pupils will not exceed the actual cost of providing the optional extra activity, divided equally by the number of pupils participating.

Residential visits

Charges may be made for board, lodging and activities that enhance the National Curriculum during residential visits but the charge will not exceed the actual cost.

Parents in receipt of certain benefits will be financially supported with the cost of board and lodging.

The Governing Body reserves the right to authorise a charge in the following circumstances:

- The cost of repair and /or replacement of items wilfully damaged or loaned and subsequently damaged or lost.

3. Remission or help with charges

In order to remove financial barriers from disadvantaged pupils, the governing body has agreed that some activities and visits where charges can legally be made will be offered at no charge or a reduced charge to parents in particular circumstances.

The school will aim to provide assistance for children from families in financial need and parents are advised to contact the Headteacher in confidence.

4. Voluntary Contributions

As an exception to the requirements set out earlier in this policy, the Headteacher or Governing Body may ask parents for a voluntary contribution towards the cost of certain items and activities such as:

- Educational visits to museums, theatres and other sites of interest which support the children's learning
- Visits by authors, poets, environmentalists, puppeteers, theatre groups and other experts who come into school to extend the children's knowledge and experience.
- Materials that enhance learning or personal, social and emotional development.
- Swimming tuition that is deemed to be required by the National Curriculum.
- Foundation Stage voluntary contributions.

The contribution must be genuinely voluntary and the pupils of parents who are unable or unwilling to contribute will not face discrimination. The governing body or head teacher will also make it clear to parents in advance that there is no obligation to make any contribution. However, if insufficient voluntary contributions are raised to fund an item or activity, or the school cannot fund it from some other source, then it may have to be cancelled.

Parents will be informed that they are welcome to discuss the voluntary contribution with the Headteacher should circumstances be such that the contribution causes some kind of difficulty.

A standard paragraph will be appended to all letters to parents regarding school outings where voluntary contributions are applicable:

We are requesting a voluntary contribution of £..... to be paid by..... If insufficient contributions are received we may have to cancel this activity. If you have any difficulties making this contribution, please make an appointment

to discuss this with the Head in confidence. The school welcomes the support, understanding and generosity of parents.

5. Additional Considerations

The Governing body recognises its responsibility to ensure that the offer of activities and educational visits does not place an unnecessary burden on family finances. To this end we will try to adhere to the following guidelines:

- Have an established system for parents to pay in instalments: Arbor or via the school office.
- Give the parents as much notice as possible of upcoming trips.

6. Refunds

Payments for activities are non-refundable except in exceptional circumstances. Examples of exceptional circumstances include the cancellation of a trip without the school incurring the whole cost. In that situation, and at the discretion of the Head Teacher and The Governing Body, the school will refund parents, wholly or in part, depending on the amount that the school is liable to pay.

Where an activity makes an unexpected surplus the school will also consider making a refund. Following guidance set out in the HCC Financial Handbook for Schools', the school will offer a refund if the surplus is either:

- 5% or more of the total cost per person, or
- £5 or more per person

Surpluses will be reimbursed in whole pounds only.

Where a refund is offered, the accompanying letter will indicate that *'a surplus of £x has been made and if the parent/guardian would like to take advantage of it they should contact the school office by a date 'x' weeks in advance. Please could you contact the school by that date or otherwise the school will be entitled to use the proposed refund as a donation to school funds.'* All refunds will be paid by cheque in order to maintain a clear audit trail. Refunds donated to the school will be transferred to an appropriate budget heading.