



HEART
EDUCATION TRUST

Charging & Remissions Policy

24 July 2019

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Adopted by: The Finance Committee on 24 July 2019

The HEART Education Trust Documents Review Record:

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2	10.10.2016	Business & Operations Executive
2.1	24.10.16	Business & Operations Executive
3	18.06.2019	Chief Operating Officer
3.1	20.06.19	COO
3.2	18.07.19	COO
3.3	02.08.2019	COO

The HEART Education Trust, a charitable company limited by guarantee registered in England and Wales with company number 08286818. Registered office address: Heartsease Primary Academy, Rider Haggard Road, Norwich, Norfolk NR7 9UE.

1. Scope

The purpose of this Policy is to set out the types of activity that can be charged for and when charges will be made by the Trust. The Policy has been drawn up in accordance with Sections 449-462 of The Education Act 1996 which sets out the law regarding what charges can and cannot be made for activities in schools maintained by local authorities which also apply to academies as set out in the Funding Agreement with the Secretary of State.

2. Definitions

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

3. Where charges cannot be made

Below we set out **what the Trust cannot charge for**:

3.1 Education

- Admission applications
- 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
 - A syllabus for a prescribed public examination that the pupil is being prepared for at a Trust academy
 - Religious education
- Instrumental or vocal tuition, for pupils learning individually or in groups, unless the tuition is provided at the request of the pupil's parent
- Entry for a prescribed public examination if the pupil has been prepared for it at a Trust academy
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at a Trust academy

3.2 Transport

- Transporting registered pupils to or from academy premises, where the local authority has a statutory obligation to provide transport
- Transporting registered pupils to other premises where the Board of Trustees or local authority has arranged for pupils to be educated
- Transport that enables a pupil to meet an examination requirement when he or she has been prepared for that examination at a Trust academy
- Transport provided in connection with an educational visit

3.3 Residential visits

- Education provided on any visit that takes place during school hours
- Education provided on any visit that takes place outside school hours if it is part of:
 - The national curriculum

- A syllabus for a prescribed public examination that the pupil is being prepared for at a Trust academy
- Religious education
- Supply teachers to cover for those teachers who are absent from the Trust accompanying pupils on a residential visit

4. Where charges can be made

Below we set out **what the Trust can charge for**.

4.1 Education

- Any materials, books, instruments or equipment, where the child's parent wishes him or her to own them
- Optional extras (see below)
- Music and vocal tuition, in limited circumstances
- Certain early years provision (see below)
- Community facilities
- School or Trust property that has been lost or damaged by a pupil or their parent

4.2 Optional extras

We are able to charge for activities or items known as 'optional extras'. In these cases, the Trust can charge for providing materials, books, instruments or equipment. The following are optional extras:

- Education provided outside of school time that is not part of:
 - The national curriculum
 - A syllabus for a prescribed public examination that the pupil is being prepared for at a Trust academy
 - Religious education
- Examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at a Trust academy
- Transport (other than transport that is required to take the pupil to a Trust academy or to other premises where the local authority/Board of Trustees has arranged for the pupil to be provided with education)
- Board and lodging for a pupil on a residential visit
- Extended day services offered to pupils (such as breakfast clubs, after-school clubs, tea and supervised homework sessions – see below)
- Uniform
- Photographs
- Meals

When 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
- The cost of buildings and accommodation

- Non-teaching staff
- Teaching staff engaged under contracts for services purely to provide an optional extra (including supply teachers engaged specifically to provide the optional extra)
- The cost, or an appropriate proportion of the costs, for teaching staff employed to provide tuition in playing a musical instrument, or vocal tuition, where the tuition is an optional extra

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

Any charge will not include an element of subsidy for any other pupils who wish to take part in the activity but whose parents are unwilling or unable to pay the full charge.

In cases where a small proportion of the activity takes place during school hours, the charge cannot include the cost of alternative provision for those pupils who do not wish to participate.

Parental agreement is necessary for the provision of an optional extra which is to be charged for.

4.3 Music tuition

The Trust can charge for vocal or instrumental tuition provided either individually or to groups of pupils, provided that the tuition is provided at the request of the pupil's parent.

Charges may not exceed the cost of the provision, including the cost of the staff giving the tuition.

Charges cannot be made:

- If the teaching is an essential part of the national curriculum
- If the teaching is provided under the first access to the Key Stage 2 instrumental and vocal tuition programme
- For a pupil who is looked after by a local authority

4.4 Residential visits

The Trust can charge for board and lodging on residential visits, but the charge must not exceed the actual cost.

5. Voluntary contributions

As an exception to the requirements set out in section 3 of this policy, the Trust is able to ask for voluntary contributions from parents to fund activities during school hours which would not otherwise be possible.

Some activities for which the Trust may ask parents for voluntary contributions include:

- School trips
- Sports activities
- Visitors to school (e.g. theatre companies, authors)

Parents are notified of the cost of these activities in advance, and may pay via ParentPay. **There is no obligation for parents to make any contribution, and no child will be excluded from an activity if their parents are unwilling or unable to pay.** If the Trust is unable to raise enough funds for an activity or visit in advance then it will be cancelled. If an activity or visit is cancelled, the Trust reserves the

right to retain any initial deposit to cover costs incurred and refund the sum of the remaining payments only.

6. Activities the Trust charges for

The Trust will charge for the following activities:

- Breakfast Club
- After School Club
- Bishy Barney Bees nursery provision

For regular activities, the charges for each activity will be determined by the Trust's Finance Committee and reviewed each year. Parents will be informed of the charges for the coming year by September of each year.

6.1 Breakfast Club

The charge for breakfast club is calculated on the basis of the cost of the staff required to deliver the provision and the catering provisions made available to pupils, having regard to the expected number of pupils that will attend.

For current charges, see Appendix A.

Individual academies have the discretion to subsidise the cost charged for this provision by using pupil premium, donations or other funds available to them from time to time.

Payment for Breakfast Club should be paid in advance through ParentPay or paid on the day of attendance after notifying the relevant academy office of use of the service. Where, at the end of a half term period, amounts remain outstanding for payment, services will be withdrawn from the commencement of the next half term and the debt will be dealt with in accordance with the debt recovery procedures set out in Trust's Finance Policy. .

6.2 After School Club

The charge for after school club is calculated on the basis of the cost of the staff required to deliver the provision and any catering provisions made available to pupils, having regard to the expected number of pupils that will attend.

For current charges, see Appendix A.

Individual academies have the discretion to subsidise the cost charged for this provision by using pupil premium, donations or other funds available to them from time to time.

Payment for After School Club should be paid in advance through ParentPay or paid on the day of attendance after notifying the relevant academy office of use of the service. Where, at the end of a half term period, amounts remain outstanding for payment, services will be withdrawn from the commencement of the next half term and the debt will be dealt with in accordance with the debt recovery procedures set out in Trust's Finance Policy. .

6.3 Bishy Barney Bees Nursery

Bishy Barney Bees Nursery supports the entitlement to free 15 hours early years provision for 3 and 4 year olds. It also offers the 30 hours free childcare to those family who meet the criteria.

The Trust provides sessional and all day care for children from the term after their 2nd birthday (Heartsease branch only). Up to 30 hours of free early years provision is available for families in receipt of certain benefits. Confirmation of eligibility for free funding will be required before commencement for 2 year old funded places.

Universal free 15 hours provision is available from the term following a child’s third birthday up until they reach compulsory school age, for every child, irrespective of background or family circumstances. A further 15 hours of free early years’ provision is available for families in receipt of certain benefits.

Regulations prescribe that children become eligible for the 15 hours universal free early years provision as follows:

A child born in the period	Will become eligible for a free place
1st April to 31st August	1st September following child’s 3rd birthday (Autumn school term)
1st September to 31st December	1st January following child’s 3rd birthday (Spring school Term)
1st January to 31st March	1st April following child’s 3rd birthday (Summer school Term)

In addition, the Trust provides wrap around daycare for pupils attending Bishy Barney Bees Nursery. The cost of this is calculated on the basis of the cost of the staff required to deliver the provision, as well as the proportional costs of buildings and operations to the Trust.

For current charges, see Appendix A.

Payment for wrap around daycare should be paid half termly in advance (unless otherwise agreed by the Trust). A non-refundable deposit of £25 and a signed contract is required for parents to secure a place at Bishy Barney Bees. Failure to pay in advance will result in the withdrawal of services. Parents will be invoiced for use of the service half termly and may make payment via ParentPay, bacs transfer or standing order.

Where invoices remain outstanding at the end of a half term period, services will be withdrawn from the commencement of the next half term. Unpaid invoices will be dealt with in accordance with the debt recovery procedures set out in Trust’s Finance Policy. .

6.4 Photographs

School photographs are managed by external partners. Products are ordered in advance via the partners’ own websites. School photographs are a source of funding for the academies. Any profit is paid into the self-generated income fund and contributes towards the academy’s operating budget. Neither the Trust nor its academies will be liable for any debts associated with such services.

6.5 Uniform

Payment for school uniform must be paid in advance via ParentPay when the order is submitted. The Trust will only fulfil orders once in receipt of payment. Uniform is priced on an at-cost basis, including associated delivery charges paid by the Trust and administrative time required to manage uniform stocks.

For current prices, see Appendix A.

6.6 Meals

Payment for school meals should be paid in advance via ParentPay. School meals are managed by the Trust's external catering provider and meal prices are set by them. Parents in receipt of certain benefits may be eligible for Free School Meals and should contact the school office for advice on how to apply.

Where a pupil meal has not been paid for in advance and that pupil has not been provided with a home lunch, the school office will attempt to contact the pupil's parent. If the school office cannot reach the parent or the parent agrees to the school providing a meal, the office will record a meal to the pupil's ParentPay account and provide a meal to the pupil for that day. This will create an arrear on the account that must be cleared before further meals can be booked. Individual pupil arrears exceeding 5 serving days will be dealt with in accordance with the debt recovery procedures set out in Trust's Finance Policy.

7. Remissions

In some circumstances the Trust may not charge for items or activities set out in sections 4 to 6 of this policy. This will be at the discretion of the Finance Committee will depend on the activity in question.

7.1 Remissions for residential visits

Parents who can prove they are in receipt of the following benefits will be exempt from paying the cost of board and lodging for residential visits:

- Universal credit in prescribed circumstances
- 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
- The guarantee element of State Pension Credit
- An income related employment and support allowance that was introduced on 27 October 2008

Appendix A
Pricing for 2019-20

Breakfast Club

Price per pupil per one hour session: £3.50

(Reception to Year 6 only)

After School Club

Price per pupil per session:

Standard Session (end of school day to 5pm): £5.00

Extended Session (end of school day to 6pm): £10.00

(Reception to Year 6 only)

Bishy Barney Bees Nursery (Wrap-Around Care)

	2 year olds	3 year olds
Additional Session (3 hours AM or PM)	£16.50	£13.50
Lunch Club (45 minutes)	£3.50	£3.50
Afternoon Extension Session (45 minutes)	N/A	£3.50
Breakfast Club (1 hour)*	£5.50	£4.50
After school Club Standard Session (end of school day to 4:30pm)*	£7	£6
After School Club Extended Session (end of school day to 6pm)*	£15	£12

* Subject to availability

Uniform

Item	Size	Price
Polo Shirts (Small)	18-26"	£5.50
Polo Shirts (Medium)	28-32"	£6.00
Polo Shirts (Large)	34-36"	£6.50

Polo Shirts (Extra Large)	38"	£7.00
Polo Shirts (XXL)	40"	£8.00
Sweatshirt (Small)	24-32"	£7.50
Sweatshirt (Medium)	34"	£8.00
Sweatshirt (Large)	36"	£9.00
Sweatshirt (Extra Large Large)	38-40"	£10.50
Sweatshirts (XXL)	42"	£11.00
Cardigan (Small)	24-34"	£9.00
Cardigan (Medium)	36"	£10.50
Cardigan (Large)	38"	£13.50
Book-bag	One size	£4.00
Tie	One size	£3.50
Swimming Hat	One size	£1.00