



Charging and Remissions Policy

This policy provides guidance for the school community on what can and cannot be charged for as part of the educational offer at John Ball Primary School.

Date agreed by Governors	January 2022
Signed on behalf of Governors	<i>Nina Hodges</i> <small>Nina Hodges (Jan 5, 2023 14:51 GMT)</small>
Date for next review:	January 2023



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In this policy you will find the following acronyms:

Acronym	Meaning
OD	Operations Director
HT	Head teacher
DHT	Deputy Head teacher
Charge	A fee payable for specifically defined activities
Remission	The cancellation of a charge which would normally be payable

1. Aims

1.1 Our school aims to:

- Have robust, clear processes in place for charging and remissions
- Clearly set out the types of activity that can be charged for and when charges will be made

2. Legislation and guidance

2.1 This is based on advice from the Department for Education (DfE) on [charging for school activities](#) and [the Education Act 1996](#), sections 449-462 of which set out the law on charging for school activities in England.

3. Roles and responsibilities

3.1 **The Governing Body**

The Governing Body has overall responsibility for approving the charging and remissions policy, but can delegate this to the head teacher.

The Governing Body also has overall responsibility for monitoring the implementation of this policy.

3.2 **Head teachers:**

The head teacher is responsible for ensuring staff are familiar with the charging and remissions policy, and that it is being applied consistently.

3.3 **Staff:**

Staff are responsible for:

- Implementing the charging and remissions policy consistently
- Notifying the head teacher of any specific circumstances which they are unsure about or where they are not certain if the policy applies
- The school will provide staff with appropriate training in relation to this policy and its implementation.

3.4 **Parents**

Parents are expected to notify staff or the head teacher of any concerns or queries regarding the charging and remissions policy.

4. Where charges cannot be made

4.1 Education

4.2 Admission applications

4.3 Education provided during school hours (including the supply of any materials, books, instruments or other equipment)

4.4 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 the school
- Religious education

4.5 Instrumental or vocal tuition, for pupils learning individually or in groups, unless the tuition is provided at the request of the pupil's parent

4.6 Entry for a prescribed public examination if the pupil has been prepared for it at the school

4.7 Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school

4.8 We ask parents to provide their children with a P.E. kit. We make no charge for specialised clothing used in school.

4.9 Transport

4.10 Transporting registered pupils to or from the school premises, where the local authority has a statutory obligation to provide transport

4.11 Transporting registered pupils to other premises where the governing board or local authority has arranged for pupils to be educated

4.12 Transport provided in connection with an educational visit (we request an optional, voluntary donation to cover this cost)

5. Where charges can be made

5.1 Below we set out what we **can** charge for:

5.2 Education:

5.3 Any materials, books, instruments or equipment, where the child's parent wishes him or her to own them

5.4 Optional extras (see below)

5.5 Music and vocal tuition, when the parent requests this

5.6 Certain early years provision

5.7 Community facilities (see Lettings Policy)

5.8 Optional extras:

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

5.10 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 the school
- Religious education

5.11 Examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school (e.g. LAMDA exams)

5.12 Transport (other than transport that is required to take the pupil to school or to other premises where the local authority or governing board has arranged for the pupil to be provided with education)

5.13 Board and lodging for a pupil on a residential visit

5.14 Extended day services offered to pupils (such as breakfast clubs, after-school clubs, tea and supervised homework sessions)

5.15 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

5.16 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.

- 5.17 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.
- 5.18 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.
- 5.19 Parental agreement is necessary for the provision of an optional extra which is to be charged for.

6. Specific Guidance: Music tuition

- 6.1 All children study music as part of the normal school curriculum. We do **not** charge for this.
- 6.2 As mentioned above, schools will 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.
- 6.3 Charges may not exceed the cost of the provision, including the cost of the staff giving the tuition.
- 6.4 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

7. Specific Guidance: Performances

- 7.1 The school may practice for and attend a concert outside the school (e.g. O2/Blackheath Halls).
- 7.2 No child will be excluded from attending the performance on the same basis as school trips. There may be a venue cost for parents to attend (e.g. ticket cost).
- 7.3 The financial transaction will be dealt with away from the child (e.g. cash in envelope or Arbor online payment).
- 7.4 The school will aim to limit the number of high cost performances, while ensuring that all the available opportunities for all children to benefit from external performances are used.
- 7.5 The school may at times charge for performances within the school (e.g. summer production). When a charge is to be made for tickets, one ticket per family will be available free of charge and further tickets may carry a small fee at the discretion of the head teacher.

7.6 In all instances where an event or production is recorded or filmed, we will act in compliance with the licence.

8. Specific Guidance: Residential visits

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

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

- Income Support
- Income-based Jobseeker's Allowance
- Income-related Employment and Support Allowance
- Support under part VI of the Immigration and Asylum Act 1999
- The guaranteed element of Pension Credit
- Child Tax Credit (provided that Working Tax Credit is not also received and the family's annual gross income does not exceed £16,190)
- Working Tax Credit run-on (this is paid for 4 weeks after an individual stops qualifying for Working Tax Credit)
- Universal Credit (if the application was made on or after 1 April 2018, the family's income must be less than £7,400 per year – after tax and not including any benefits)

9. Specific Guidance: Voluntary contributions

9.1 As an exception to the requirements set out in section 5 of this policy, the school is able to ask for voluntary contributions from parents to fund activities during school hours which would not otherwise be possible.

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

- Visits to museums
- Sporting activities which require transport expenses
- Outdoor adventure activities
- Theatre visits
- Musical events

9.3 This list is not exhaustive.

9.4 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.

9.5 If the school is unable to raise enough funds for an activity or visit then it will be cancelled.

10. Absence from previously paid for activities

- 10.1 If a pupil is unable to make a school trip due to poor health, parents will be unable to claim refund on the charges for transport to the trip location.
- 10.2 Refund of the charge for entry will be subject to the provider's terms and conditions.
- 10.3 Any refund received for a child who is absent, will be passed directly on to the parent/carer. School will not make profit as a result of absence from a school trip/residential.
- 10.4 Specific Guidance: Fundraising during school time
- 10.5 The school may from time to time take part in fundraising activities to raise funds for charities not connected with the school at the discretion of the Head Teacher (e.g. sponsored events, performances). No child will be treated differently or pressurised for not taking part in the activity or contributing financially or otherwise.
- 10.6 The Classroom Teacher may collect financial or other contributions in an open classroom, but will do so in such a way as to not cause embarrassment to any child.
- 10.7 The school may from time to time advertise fundraising activities connected with The Friends of John Ball Association. This may be done via the Classroom Teacher, Assembly, pupil representatives, leaflets and posters etc.
- 10.8 The advertising does not constitute an invitation to the event. The Friends of John Ball Association are wholly responsible for the event or activity and selling entry tickets per their Ticket Policy.
- 10.9 The school may also, from time to time take part in fundraising activities to raise funds for a specific item/ extras for John Ball School.
- 10.10 No child will be treated differently or pressurised for not taking part in the activity or contributing financially or otherwise.
- 10.11 The Classroom Teacher may collect financial or other contributions in an open classroom, but will do so in such a way as to not cause embarrassment to any child.

11. Specific Guidance: Author Visits

- 11.1 John Ball Friends Associate fund one author to visit the school each academic year.
- 11.2 All children will have the opportunity to hear the author speak/take part in a workshop

- 11.3 There is no obligation for children to purchase the author's book/work. However, on occasions, they will have the opportunity to do so. No child will be treated differently if not purchasing the author's book/work, nor pressurised to purchase.
- 11.4 The financial transaction will be dealt with away from the child and the books will be distributed away from the talk/workshop (e.g. cash in envelope via the school office or on Arbor). This will ensure that no child will feel left out during the talk.
- 11.5 We will also give clear guidance to any incoming publishers on how and where they can expect to distribute the books.

12. Advertising for extra curriculum and out of school activities

- 12.1 Advertising is at the discretion of the head teacher.
- 12.2 Where an advert is placed in the children's bag, it will be clear who will benefit from the fee for the activity.
- 12.3 If the event being advertised is to raise funds for the school, it will be clear on what basis the tickets will be available (e.g. 1st come, 1st served).
- 12.4 There should be clear information available about the activity to enable the parent to make an informed choice about attending.
- 12.5 Outside organisations may at times offer free workshops to inform children of their services (e.g. Perform, Crystal Palace Diving).
- 12.6 Parents will be informed of the service the organisation provides or the opportunities available to children and that there is a cost attached to it as soon as is reasonable, and where appropriate how much the cost is.
- 12.7 No child will be excluded from the event if they do not wish to use the services of the organisation.

13. Payment using Arbor

14. Debt Recovery

Any money owed to school has an impact on the budget and may affect the resources we can provide to all children. We hope that all stakeholders understand this and will make every effort to avoid owing the school money.



The school will take all reasonable measures to vigorously collect debts as part of its management of public funds. A debt will be written off or passed to the local authority legal department only after all reasonable measures (commensurate with the size and nature of the debt) have been taken to recover it.

The school's Debt Recovery Policy will observe the relevant financial regulations and guidance given by the local authority and other legal requirements.

14.1 **Acceptable 'Credit Period'**

The Governing Body has determined that one half term is an acceptable credit settlement period before the debt recovery procedures are applied.

14.2 **Reporting of Outstanding Debt Levels**

The Operations Director will ensure that the level of debt is regularly monitored. Suitable records will be maintained to detail individual debts and the total value of debt to the school in order that it can be determined at any time and reported to the Finance Committee, who will review the level of outstanding debts every term to determine whether this level is acceptable and whether action to recover debts is effective.

14.3 **Debt Recovery Procedures**

Where payment from the parent or guardian has not been received in advance or at the point of sale, the following process should be applied:

- 1) Initial "overdue payment reminder". This initial reminder may be informal and could be done either over the telephone/text or in person, if appropriate.
- 2) First "overdue payment" reminder letter. A formal letter is issued 1 week after the informal reminder. If action is to precede further, it is necessary to prove that all reasonable attempts have been made to recover the debt, and that these attempts have been made in a timely manner. The date of this letter should be recorded.

In the case of school meals, if the debt is not settled on the following day then we may be unable to provide your child with a school dinner and you MUST provide a packed lunch or take the child home for dinner. If a child with an outstanding meal debt orders a school meal then the office will telephone the parents to make alternative arrangements for lunchtime. If the parents do not do this then the school may refer the family to Social Services under our child protection procedures.

In the case of lettings, the facilities will not be opened for use until payment is received.

- 3) Second “overdue payment” reminder letter. A second letter will be issued 2 weeks after the first reminder letter. The date of the second reminder letter should be recorded.

14.4 **Failure to respond to reminders/settle a debt**

If there is no response to the second overdue payment reminder letter the debtor will be invited to meet the Headteacher to discuss how the debt will be settled. At this meeting every effort will be made to work with the parent/guardian/lettings to pay off the existing debt. Failure to attend the meeting or stick to the agreed terms of repayment decided in the meeting may result in a referral to the local authorities’ debt collection department. At this point the debtor will be advised that they will be required to pay in advance for all future supplies or usage of premises. This decision and its basis will be recorded and reported to the Finance Committee.

14.5 **Negotiation of repayment terms**

Debtors are expected to settle the amount owed by a single payment as soon as possible after receiving the first overdue payment reminder letter. If the debtor is unable to pay, the school may reduce or cancel a debt in certain circumstances. A sensitive approach to debt recovery will be carried out. Taking the following factors into account:

- Hardship – where paying the debt would cause financial hardship;
- Ill health – where our recovery action might cause further ill health;
- Time – where the debt is so large compared to the person’s income that it would take an unreasonable length of time to pay it off;
- Cost – where the value of the debt is less than the cost of recovering it;
- Multiple debts – where someone owes more than one debt to the school. In this situation an attempt to agree one repayment plan to include all debts will be established.

Repayment terms may be negotiated at the discretion of the Headteacher and will be reported to the Finance Committee. In all cases a letter will be issued to the debtor confirming the agreed terms for repayment. The settlement period should be the shortest that is judged reasonable. The finance committee will decide whether any debtor who has been granted extended settlement terms will be offered any further credit and will, in future, be required to pay in advance.

14.6 **Bad Debts**

A write-off of any debt over the value of £1000 requires the approval of the Finance Committee.