

CHARGING AND REMISSIONS POLICY

The Board of Trustees, CEO and Strategic team are committed to safeguarding and promoting the welfare of children and young people and requires all staff and volunteers to demonstrate this commitment in every aspect of their work.

This policy was created and ratified by the Wensum Trust Board:	November 2020
Responsible for updating:	Trust Finance Manager
This policy will be reviewed by the Wensum Trust Board: (unless earlier review is recommended by the Wensum Trust)	September 2022
Policy Version:	V3
Signed by the Chair of the Board of Trustees:	Signed by J. Smith, Chair of Trustees

Associated Documentation

[Academies Financial Handbook](#)

Related Policies

- Financial Regulations Policy

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Definitions

- The Trust means The Wensum Trust
- Headteacher/Principal refers to Principals at Secondary Phase and Headteacher at Primary Phase
- Governor also means Trustee depending on reporting channels

Introduction

The Wensum Trust recognises the valuable contribution that the wide range of additional activities, including trips, clubs and residential experiences can make towards students' education. The Wensum Trust aims to promote and provide such activities both as part of a broad and balanced curriculum for the students within the Trust and as additional optional activities.

The purpose of this policy is to ensure that there is clarity over those items that the Trust will provide free of charge and for those items where there may be a charge. It also clarifies the position regarding refunds. The policy has been informed by the Local Authority Policy and Department for Education guidance.

As a not-for-profit organisation we do not intend to make a profit from activities/trips. The Trust shall endeavour to break-even in the running of Academy activities/trips but recognise that this is not always possible. Activity accounts shall be produced for each individual activity/trip and will be provided to the Local Advisory Body for their consideration.

Contributions

Voluntary contributions may be sought for activities during the academy day which entail additional costs, for example field trips and other visits outside Academy. In these circumstances no student will be prevented from participating because his/her parents/carers cannot or will not make a contribution. (If insufficient funds are available it may be necessary to curtail or cancel activities).

From time to time an Academy may invite non-academy-based organisations such as visiting theatre companies, lecturers etc. to arrange an activity during the academy day. If such organisations levy a charge, parents/carers may be asked to make a voluntary contribution. In these circumstances no student will be prevented from participating because his/her parents/carers cannot or will not make a contribution (if insufficient funds are available, it may be necessary to cancel the activity).

Charges

The Wensum Trust reserves the right to make a charge in the following circumstances for activities organised by an Academy:

- 1. Academy Activities Organised during the Academy day**
The board and lodging element of approved residential activities deemed to take place during the academy day.
- 2. Activities Outside the Academy day**
The full cost to each student of all approved activities deemed to be optional extras taking place outside the academy day.
- 3. Individual Instrumental Tuition**
The cost to the student for providing any instrumental tuition not part of normal Local Authority peripatetic provision.
- 4. Charging in Kind**
In subjects such as Design & Technology, Food Technology, Science, Art/Craft when the parent/carer is to receive the finished product, a charge will be made for the cost of materials and ingredients.

5. Examinations

If the student has an attendance rate of less than 90% the Academy may exercise the right of charging for examination entry fees.

Calculating Charges

Before a trip is approved, detailed costing shall be produced by the trip/activity organiser to ensure that there will not be an excessive surplus or deficit on the trip/activity.

When charges are made for an activity, whether during or outside of the academy day, they shall be based on:

- Actual costs incurred
- Supply cover incurred (where required)

These costs shall be divided by the total number of students participating. Support for cases of hardship will come through voluntary contributions, Pupil Premium and fundraising. Parents/carers who qualify for support are those in receipt of eligible state benefits.

The principles of value for money shall be applied when planning activities that incur costs to the Academy and/or charges to parents/carers.

Music Tuition

In cases of hardship the Headteacher/Principal shall consider, at their absolute discretion, the remission of fees (either in full or in part) for those students who they consider will benefit from such tuition.

Remissions

Where the parents/carers of a student are in receipt of eligible state benefits (listed below) the Wensum Trust will offer to remit in full the total cost of board and lodging for any compulsory residential activity which is deemed to take place during the academy day and/or where it forms part of the syllabus for the National Curriculum.

Eligible State Benefits

- Income Support
- Income-based Jobseeker's Allowance
- Support under part VI of the Immigration and Asylum Act 1999
- Child Tax Credit, where the parent/carer is not entitled to Working Tax Credit and where income has been assessed by Her Majesty's Revenue and Customs as being below the current threshold specified by HMRC.
- Guaranteed State Pension Credit

Wherever possible, leaders of trips and activities shall indicate the availability of charitable funding for parents and carers in receipt of above benefits (e.g., the charity 'Anguish Trust' or similar).

The Wensum Trust may wish to remit in full or in part the cost of other activities for particular groups of parents/carers, in exceptional circumstances. When arranging a chargeable activity such parents/carers will be invited in confidence for the remission of charges in full or in part. Authorisation for such remission shall be made by the Head Teacher/Principal in consultation with the Chair of Governors of the Local Academy Board.

Refunds

Refunds shall only available in the following circumstances:

- If a student is not able to take part in an activity due to a clash of activities, planned by the Academy, e.g., a music lesson which cannot be rescheduled taking place on the same day as an Academy trip.
- If a student is no longer able to take part in an activity and gives sufficient notice to the Academy for the specific activity, any refund of costs obtained by the Academy will be passed to the student. This would not include, in the case of an Academy visit, transport costs as this is generally purchased collectively.
- If voluntary contributions exceed the final costs of any activity, refunds will be made to individual students, if the amount is equal to or exceeds £5.00 per head. Any surplus funds of less than £5.00 per head will be paid into a central fund to support future trips and activities.

In all cases of withdrawal, either voluntarily or otherwise, applications for refunds should be made in writing to the Academy's Office. Refunds will be made by cheque and all applications for refund should include the payee details.

NOTE: The Academy reserves the right NOT to refund costs where a student is withdrawn from an activity by the Academy on the basis of the student's unacceptable behaviour.

Monitoring and Review of Policy

The Trust will review this policy every 2 years and assess its effectiveness and implementation. Any deficiencies identified shall be corrected and used to inform review of the policy, which will be promoted and implemented throughout the Trust.

The Trust Finance Manager will report on the effectiveness of the policy to the Trust Board or Budget & Infrastructure Committee as appropriate.