

Charging and Concessions Policy

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1. Introduction

- 1.1. This policy has been formulated in accordance with the Department for Education (DFE) advice on charging for school activities.
- 1.2. The Governing Body recognises the valuable contribution that the wide range of additional activities, including trips, clubs and residential experiences can make towards pupils' education. The Governing Body aims to promote and provide such activities both as part of a broad and balanced curriculum for the pupils of the school and as additional optional activities. However owing to the limited funds in the delegated budget the Governing Body reserves the right to make a charge in the following circumstances for activities organised by the school. The Governing Body will from time to time, review and amend the categories of activity for which a charge may be made.

2. Aim

- 2.1. The aim of this policy is to set out what charges should be levied for school activities, what remissions could be implemented and the circumstances under which voluntary contributions can be requested from parents.
- 2.2. Sections 7, 8 and 9 cover education provided wholly or mainly during school hours; Section 10, outside normal school hours; Section 11 covers charges for extended activities outside school hours, provided by or on behalf of the Governing Body of Huntcliff School.

3. Definition of Extended Provision

- 3.1. Extended use of school premises is when schools open up their school facilities either before, during or after the school day as well as during school holidays for educational, community or commercial use.
- 3.2. Education use is defined as any activity directly related to the curriculum.
- 3.3. Community use is defined as facilities and services that benefit families and the community as well as pupils.
- 3.4. Commercial use is defined as school facilities being let to external organisations/groups on a profit basis.

4. Responsibilities

- 4.1. The Governing Body of Huntcliff School is responsible for determining the content of the policy and the Headteacher for its implementation. Any decisions with respect to individual parents will be considered by the Headteacher.
- 4.2. The Governing Body should make all users aware of the school's safeguarding procedures, especially when the school is being let during the normal school day.
- 4.3. The Governing Body must ensure that all site users have their own safeguarding procedures in place and all staff are aware of their content. Safeguarding procedures should be equivalent to those adopted by the Local Safeguarding Children's Board (LSCB) within North Lincolnshire.

5. Prohibition of Charges

- 5.1. In line with DFE guidance, the Governing Body will not charge for any of the following:-
- 5.2. Education provided wholly or mainly during school hours (including the supply of any materials, books, instruments or other equipment);
- 5.3. Education provided outside school hours if it is part of the national curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education;
- 5.4. 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 the school, or part of religious education;
- 5.5. Entry for a prescribed public examination, if the pupil has been prepared for it at the school;
- 5.6. Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school;
- 5.7. Education provided on any trip that takes place wholly or mainly during school hours;
- 5.8. Education provided on any trip that takes place outside school hours if it is part of the national curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education;
- 5.9. Supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential trip;
- 5.10. Transporting registered pupils to or from the school premises, where the school has a statutory obligation to provide transport;
- 5.11. Transporting registered pupils to other premises where the Governing Body or the school has arranged for pupils to be educated;
- 5.12. Transport that enables a pupil to meet an examination requirement when they have been prepared for that examination at the school;
- 5.13. Transport provided in connection with an educational trip that is wholly or mainly in school hours.
- 5.14. The School will ask for Voluntary contributions in line with the procedures.

6. Publication of Information

- 6.1. A summary of this policy is on the school website. A full copy will be provided on request.

7. Charges for Curricular Activities

- 7.1. A charge will be made for:
 - 7.1.1. Board and lodging on residential visits (not to exceed the costs incurred)
 - 7.1.2. The proportionate costs for an individual child taking part in activities wholly or mainly outside school hours ('optional extras') to meet the costs for:
 - 7.1.3. Travel
 - 7.1.4. Materials and equipment
 - 7.1.5. Staffing costs
 - 7.1.6. Entrance fees

- 7.1.7. Insurance costs
- 7.1.8. Individual tuition in the playing of a musical instrument: a contribution. The amount of the contribution will be reviewed annually by the Governor's Finance Sub Committee.
- 7.1.9. Re-sits for public examinations where no further preparation has been provided by the school
- 7.1.10. Costs of non-prescribed examinations where no further preparation has been provided by the school
- 7.1.11. Any other education, transport or examination fee unless charges are specifically prohibited.
- 7.1.12. Breakages and replacements as a result of damages caused wilfully or negligently by pupils. This does not in any way detract from the teaching staff's duty to brief pupils thoroughly and to manage a calm and safe working environment for the pupils.
- 7.1.13. Extra-curricular activities and school clubs.
- 7.1.14. The Governing Body reserves the right to charge for ingredients, materials or equipment (or the provision of them by parents/carers). The pupil will take home the finished product.
- 7.2. Transport in a Minibus
- 7.3. As the school has charity status, and for educational purposes only, payments towards the cost of passengers being carried in a minibus can be requested as long as it is only wholly not-for-profit. The school holds a Section 19 Permit instead of a PSV Licence. The Permit only allows passengers that are pupils and staff of the school to be transported in the minibus.

8. Concessions

- 8.1. Where the trip takes place wholly or mainly during school hours, but it is necessary as part of the national curriculum, children will, in addition to having a free school lunch entitlement, also be entitled to concession of these charges if their parents are in receipt of any of the following support payments:
 - 8.1.1. Income Support;
 - 8.1.2. Income-based Jobseeker's Allowance;
 - 8.1.3. Employment support Allowance (income related);
 - 8.1.4. Child Tax Credit with annual earnings of below £16,190 **and no** Working Tax Credit Allowance.
- 8.2. A similar entitlement to concessions applies where the trip takes place outside of school hours but it is necessary as part of the national curriculum, forms part of the syllabus for a prescribed examination that the school is preparing the pupil to sit, or the syllabus for religious education.
- 8.3. In respect of (8.1) above, the amount taken into account will be revised periodically in line with changes to the amount published by the DFE.

9. Charging for items and visits: Voluntary Contribution

- 9.1. Parents will be invited to make a voluntary contribution for school visits:
- 9.2. Voluntary contributions will be used for:
 - 9.2.1. Pupils' travel cost;
 - 9.2.2. Materials and equipment;
 - 9.2.3. Entrance fees to museums, theatres etc;
 - 9.2.4. Insurance costs;

- 9.3. The terms of any request made to parents will specify that the request is for a voluntary contribution. However, in reality, the value of the requested contribution equates to the total cost of the visit.
- 9.4. All Visits: The Group leader should always ensure that parents are notified as early as possible to:-
- 9.4.1. The total cost of the visit.
 - 9.4.2. How much spending money pupils will reasonably need (especially important for trips which involve a residential element).
 - 9.4.3. Early notification of the above is important as this allows parents/carers to make financial preparations.

10. Outside of Normal School Hours/Optional Extras: Charging for Visits

- 10.1. The Headteacher can charge parents for board and lodging on residential visits as well as the full cost when a visit is deemed to be an 'optional extra'. An optional extra:
- 10.1.1. Falls wholly or mainly outside school hours, ie watersports holiday during the school holidays is an optional extra.
 - 10.1.2. Does not form part of the National curriculum or the statutory requirements for religious education.
 - 10.1.3. Is not part of a syllabus towards a Prescribed Public Examination – if a GCSE Geography syllabus mentioned fieldwork as a requirement then this in itself does not necessitate a residential fieldtrip to another part of the country as local facilities may suffice.
 - 10.1.4. The parents/carers agreement to meet the costs of an optional extra visit before the visit is planned in detail will always be obtained in writing. The stated cost of an optional extra visit must not include an element of subsidy for pupils whose families do not meet the full charge.
 - 10.1.5. Parent/carer permission should be obtained by a Parental/Carer Declaration. Eg. Parents/carers sign a declaration which contains, e.g. I understand:
 - 10.1.6. That current legislation does not require the School to arrange subsidies for the visit.
 - 10.1.7. That if insufficient number of pupils opt for the visit then the visit may have to be cancelled.
 - 10.1.8. That my child cannot attend this 'optional extra' visit if full payment is not made by myself/ourselves.

11. Charges for Extended Activities

- 11.1. There is no charge for the use of Huntcliff's premises for optional, extra activities provided outside of the school day, just a small tuition fee for clubs. Charges are made for extended activities provided in or around the school by, or on behalf of the Governing Body. These fall under the following three broad categories:
- 11.1.1. *Educational activities*: Activities organised or commissioned by the school for the benefit of their own pupils such as study support and other enrichment activities (e.g. additional language tuition, music practice, chess club etc).

- 11.1.2. *Non-educational activities*: Extra-curricular activities organised by the school such as the provision of childcare for school staff or recreational activities for school pupils.
 - 11.1.3. *Community programmes*: Activities organised for the benefit of the wider community, often run with or by external groups (e.g. pre-school childcare, sport, performing arts, adult education).
 - 11.1.4. Charges are made for renting or leasing part of the school premises or use of school equipment.
 - 11.1.5. A schedule of charges for individual activities currently provided on or around the school site is available on request.
- 11.2. The school's schedule of charges for activities is available on request.

12. Optional extras

12.1 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 education provided outside of school time that is not:

- 12.1.1 part of the national curriculum;
- 12.1.2 part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school; or
- 12.1.3 part of religious education.
- 12.1.4 examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school;
- 12.1.5 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);
- 12.1.6 board and lodging for a pupil on a residential visit;
- 12.1.7 extended day services offered to pupils (for example breakfast club, after-school clubs, tea and supervised homework sessions).

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

- 12.2.1 any materials, books, instruments, or equipment provided in connection with the optional extra;
- 12.2.2 the cost of buildings and accommodation;
- 12.2.3 non-teaching staff;
- 12.2.4 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
- 12.2.5 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.

12.3 Any charge made in respect of individual pupils must not exceed the actual cost of providing the optional extra activity, divided equally by the number of pupils participating. It must not therefore include an element of subsidy for any other pupils wishing to participate in the activity whose parents are unwilling or unable to pay the full charge.

Furthermore 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.



Therefore no charge can be made for supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential visit. 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.

13. Voluntary contributions

13.1.1 Nothing in legislation prevents Huntcliff and their governing body from asking for voluntary contributions for the benefit of the school or any school activities. However, if the activity cannot be funded without voluntary contributions, the Governing Body or Headteacher should make this clear to parents at the outset in the communication sent out to Parents / Carers. The Governing Body or Headteacher must also make it clear to parents that there is no obligation to make any contribution. The Headteacher, can delegate this to staff.

13.1.2 No child can be excluded from an activity simply because his or her parents are unwilling or unable to pay.

13.1.3 If insufficient voluntary contributions are raised to fund a visit, or Huntcliff School cannot fund it from some other source, then it must be cancelled.

13.1.4 Huntcliff School will ensure that this is made this clear to parents.

13.1.5 If a parent is unwilling or unable to pay, their child must still be given an equal chance to go on the visit.

13.1.6 Huntcliff School will make it clear to parents at the outset what their policy for allocating places on school visits will be.

13.1.7 When making requests for voluntary contributions, parents must not be made to feel pressurised into paying as it is voluntary and not compulsory.

13.1.8 Huntcliff School will not send colour coded letters to parents as a reminder to make payments and direct debit. Standing order mandates will not be sent to parents when requesting contributions.

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APPENDIX 1

Guidance for Charges for Community Use of School Premises and Facilities

Schools and other providers may identify different levels of charges depending on the nature of the activity being provided. Listed below are 5 possible levels of charging:

- *Commercial charges:* Aims to cover the cost of providing a service and make a surplus.
- *Full Cost Recovery:* Aims to recover the costs of providing this service from those who use it.
- *Subsidised:* Users of the service make a contribution to the costs of providing it.
- *Free:* The service is made available at no charge to meet a service objective.
- *Statutory:* Charges are determined in line with legal requirements.

The table below provides examples of how a differentiated charging structure could be applied to various activities.

Charging Level	Description	Activity Types – Some Examples
Commercial charges	Aims to cover the cost of providing a service and make a surplus	<ul style="list-style-type: none"> • Letting part of the school to a commercial company as a venue • Commercial car boot sale • Use of parking facilities
Full Cost Recovery	Aims to recover the costs of providing this service from those who use it	<ul style="list-style-type: none"> • Non-educational trips and activities • Community activities • Use of the school for adult education (although fees for use may be subsidised by the provider, or through grants)
Subsidised	Users of the service make a contribution to the costs of providing it	<ul style="list-style-type: none"> • Educational trips and extended activities (the subsidy may be for all users, or only for those on limited means)
Free	The service is made available at no charge to meet a service objective	<ul style="list-style-type: none"> • Study support
Statutory	Charges are determined in line with legal requirements	<ul style="list-style-type: none"> • Use of school premises for elections or for official meetings of Parish or Parochial Church Councils

APPENDIX 2

Calculation of base-line premises costs

To calculate the base-line premises costs (in terms of pence per square meter per hour) for an approximate cost of running the school, input the following data into an excel spreadsheet:-

1. Identifying from period 12 monitoring reports (from the previous year's budget) all the fixed and variable building related costs, and any staffing costs related to the administration of the building, and then multiplying that figure by 3.5% for inflation (might be higher!)
2. Next use the 'net capacity area' (not the gross area of the building because the former is more akin to the concept of 'available letting space') to get an approximation of the annual cost per square metre
3. This is then divided by 1265 – the normal teaching year; to get a base-line value
4. The area of the room(s) for letting (not including any corridors/toilets/ or plant) is then multiplied by the base-line value to get a value of a letting at cost.
5. Identify any additional specific costs for that event and add them to get the total cost of the letting.

Difficulties in interpreting/applying the results of the pro-forma:

- 1) Lifetime building maintenance costs depend so much on the actual building - as quality varies so much. To keep it simple the formula assumes a building life of 80 years and so divides 80 into the current estimated rebuilding cost of the school.
- 2) There are difficulties in accurately assessing the time spent by existing staff on supporting extended schools, and an estimate of time spent by the secretary/head/bursar is all that is possible.

External areas

When calculating charges for use of playing fields and other external facilities you must estimate the yearly number of hours of use and divide this into the grounds maintenance/repair cost from the previous financial year plus an inflationary figure, say 3.5 percent. This will give you a cost per pitch per hour. The amount the school charges will depend on whether it is calculated on actual time and multiply it by 1.5 for a football match or round the figure up the nearest hour, for example 2 hours.

If the overall maintenance cost for playing fields is £2500 and it is used on average seven pitch hours a week then the charge per hour will be 1.4 hours/day x 192 days divided into £2500 giving £9.30 per pitch/hour.