



OCL CHARGING & REMISSIONS POLICY



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At a glance

Oasis Community Learning is totally committed to developing the character and competence of every student and believes that all students should receive an exceptional education.

Through this policy, OCL aims to ensure that it meets its statutory obligations regarding charging and remissions.

The Trust aims to have robust, clear processes in place for charging and remissions and to set out the types of activity that can be charged for and when charges will be made.

OCL is committed to the principles of inclusion and equality so that all students have an equal opportunity to access as many benefits that the academy can provide as possible.

With this in mind, this policy is designed to ensure that OCL academies:

- Include all their students in all their activities and that students are not excluded when they cannot pay for activities.
- Provide as many activities free of charge as possible.
- Set out when charges will be made.
- Are clear about the circumstances in which charges are not made (remissions).

No child will be excluded from an activity because the parents are unwilling or unable to pay for that activity. If the academy is unable to raise enough funds for an activity or visit for all students, then it will be cancelled. While there is always an opportunity for parents to make **voluntary contributions** there is no obligation for parents to make any such contribution and this will not lead to exclusion of the children of those parents from any activity.

Checklist

- Our approach to charging is underpinned by the Oasis Ethos and 9 Habits with the aim of making our academies fully inclusive to all parts of the communities we serve.
- We will not ask for financial contributions as part of the admissions process.
- We will not charge for education provided during school hours including the supply of any materials, books, instruments, or other equipment.

- We will only charge for optional extras or where contributions are permitted, and we will make parents aware at the outset that a charge will be made and the amount.
- We will communicate with parents, giving enough notice of trips.
- We will reimburse parents where the academy has overcharged or there has been an amendment to the cost of a trip.
- We will not exclude any child from an activity because their parent or carer could not pay.

In brief

This policy covers our approach to **charging**: what we can and cannot charge for participation in specifically defined activities or providing resources (e.g. books or musical instruments). Included within this is when and how voluntary contributions can be requested.

It also covers our approach to **remissions**: the circumstances in which an academy can reduce or cancel any charge that would otherwise have been payable in accordance with the charging aspect of this policy. Remissions may be applicable where parents or carers are in receipt of certain benefits.

Charges

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

Education

- Admission applications.
- Education provided during academy hours (including the supply of any materials, books, instruments or other equipment).
- Education provided outside academy 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 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 (e.g., peripatetic music lessons).

- Entry for a prescribed public examination if the pupil has been prepared for it at the academy.
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the academy.

Transport

- Transporting registered pupils to or from the academy premises, where the local authority has a statutory obligation to provide transport.
- Transporting registered pupils to other premises where the academy or local authority has arranged for pupils to be educated.
- If regular provision is provided in an alternative academy, then transport must be paid for by the pupil's original academy.
- Transport that enables a pupil to meet an examination requirement when they have been prepared for that examination at the school.
- Transport provided in connection with an educational visit.

Residential visits

- Education provided on any visit that takes place during academy hours.
- Education provided on any visit that takes place outside academy 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.
- Supply teachers to cover for those teachers who are absent from the academy accompanying pupils on a residential visit.

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

Education

- Any materials, books, instruments or equipment, where the child's parent wishes the child to own them.
- Optional extras (see below).
- Music and vocal tuition, in limited circumstances (e.g., peripatetic music lessons).
- Certain Early Years provision (e.g., additional hours in a Nursery class).

- Community facilities.

Optional extras

We can charge for activities known as 'optional extras'. In these cases, the school 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 the academy.
 - Religious education.
- Examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school.
- Transport (other than transport that is required to take the pupil to the academy or to other premises where the Local Authority 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).

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.

Music tuition

The school 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.

Residential visits

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

Voluntary Contributions

As an exception to the requirements set out above the school 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 school may ask parents for voluntary contributions include a range of activities such as:

- Trips (including transport).
- Sports activities.
- Theatre company visits to the academy.
- Swimming instruction and travelling expenses.
- Cycling proficiency.

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

Sample phrase to be added to trip letters: *"I must stress that any financial contribution would be entirely voluntary and that your child would not be denied a*

place on the visit just because you declined to make a voluntary payment. However, the school will not proceed with the visit unless there will be sufficient voluntary contributions for it to be financed. It is not possible for the school to meet the costs of the trip without using funds required for children's basic educational needs such as staffing and educational resources."

See Appendix A and B for sample letters to Parents.

Communication with parents

Academies should make every effort to:

- Ensure parents / carers are given plenty of notice of expensive trips.
- Aim to share with parents the trips planned for the year in each year group so that parents can budget ahead.
- Establish systems so that parents can pay by instalments.
- Extend systems for payment by instalment if the trip arises at short notice.
- Establish cash free online payment systems to support parents/carers who cannot easily get to the academy and to enable security of payment.

Remissions

Remissions for residential visits

Parents whose children are eligible for free school meals, that can prove they are in receipt of the following benefits, will be exempt from paying the cost of board and lodging for residential visits. **However, a voluntary contribution, at a reduced rate, will be requested:**

- 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 guaranteed element of State Pension Credit.
- An income related employment and support allowance that was introduced on 27 October 2008.

Charges can be made for activities, trips and visits.

Refunds

If the academy has overcharged or there are amendments to the cost of the trip/event, the academy will reimburse parents as long as the sum per pupil is greater than £5.

Monitoring arrangements

The Principal monitors charges and remissions in the academy and ensures these comply with this policy. The Regional Director will ensure that the policy is being followed correctly and feedback any concerns from academies to the National Education Team.

Responsibilities

The OCL Board / CEO / Regional Director

Regional Directors must ensure that each Principals adheres to the policy.

The Principal (or Lead / Executive Principal)

The Principal is responsible for ensuring staff are familiar with the Charging and Remissions policy, and that it is being applied consistently.

Staff

Our staff are responsible for:

- Implementing the charging and remissions policy consistently.
- Notifying the Principals of any specific circumstances which they are unsure about or where they are not certain the policy applies.

Parents

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

Training requirements

Senior Leaders will provide staff in academies with appropriate training in relation to this policy and its implementation.

Statutory requirements

This policy 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. Academies are required to comply with this Act through their funding agreements. This policy also complies with [The Charges for Music Tuition \(England\) Regulations 2007](#) and OCL's funding agreement and articles of association.

RACI Matrix

Policy Element	Leadership			Academy			[Service]	[Team]
	Board	OCL CEO	OCL COO	Regional Director	Academy Principal	Teacher	Finance	Regional Finance Team
We will not ask for financial contributions as part of the admissions process.					R			C & I
We will not charge for education provided during school hours including supply of any materials, books, instruments, or other equipment.					R & A			C & I
We will reimburse parents where the academy has overcharged or there has been an amendment to the cost of a trip.					R		A	C & I

We will not exclude any child from an activity because their parents or carer could not pay.					R				C & I
We will communicate with parents, giving enough notice of trips.					R & A				C & I



APPENDIX 1 Sample letter requestion a voluntary contribution from parents

Dear Parents/Carers of Children in Class One

Visit to West Town Farm, Tuesday 22nd May 20XX

On **Tuesday 22nd May 20XX**, Class One will be visiting West Town Farm at Ide; in partnership with Organic Arts and Love Local Food. During the visit we will be able to study many aspects of the Year One Science and Geography curriculum; including plants, animals, seasonal changes and the farm environment. We will leave school at **9.00am** with a view to arriving at West Town Farm for **9.45am**. Children can order a packed lunch from school on the form provided or bring one from home for this trip. If you wish to order a school packed lunch, please complete the form attached and return to the main School Office by **9am on Wednesday 9th May 20XX** at the very latest.

The cost is £9.00 per child. We are very keen for parents to use their debit or credit card on the online payment system Bromcom to pay for this activity. The Bromcom website can be accessed from the parent page of our school website 24 hours and day 7 days a week.

I must stress that any financial contribution would be entirely voluntary and that your child would not be denied a place on the visit just because you declined to make a voluntary payment. However, the school will not proceed with the visit unless it is clear that there will be sufficient voluntary contributions for it to be financed. It is not possible for the school to meet the costs of the trip without using funds required for children’s basic educational needs such as staffing and educational resources.

This visit is partly being funded through the Environmental Stewardship Scheme and a donation from our Friends association.

Children do not need to bring their school bags on this day. Please include a drink but no fizzy drinks or glass containers. Children will need to wear a warm waterproof coat, long trousers as there are lots of nettles and wellington boots for this event. **NO school uniform.**

We will aim to leave West Town Farm in time to return to School for pick-up at **3.15pm**.

We will need some parent helpers for this trip. Please indicate on the slip below if you can help. Your assistance will be gratefully received.

Yours sincerely

Class One Teachers

*Please return to your child’s class teacher at morning registration by **Wednesday 9th May 20XX***

Class One Visit to West Town Farm on Tuesday 22nd May 20XX

Please tick as applicable

- I have read the above information and I enclose £9.00 towards the cost of coach hire and the cost of materials at the farm. / I have paid on Bromcom
- I am able to accompany the class on the day.
- I would like to order a school packed lunch.

Name of Child: Class:

Signed:..... Date.....

Appendix 2 Sample letter for a residential visit, where a parents is in receipt of certain benefits and will be exempt from paying the cost of board and lodging

Dear Parents / Carers,

London Residential 20XX

This trip will run over 3 days and 2 nights. One trip will run from Monday 18th June 2022 – Wednesday 20th June 20XX and the second trip will run from Wednesday 20th June 20XX - Friday 22nd June 20XX. The two groups will overlap at Hampton Court Palace on the middle Wednesday. As in previous years, we will be staying at the Baden Powell Lodge (part of the Meininger Hotels group) in Kensington. The hotel was initially set up for Scout and Guide groups so is perfectly set up for school groups, offering beds in dormitories and separate rooms for accompanying adults. It is extremely safe and is well used by other schools too.

The residential will include a trip to the Tower of London, a day at Hampton Court Palace, a visit to the Natural History Museum, an evening at the theatre watching 'Matilda', a meal at The Rainforest Café and a Sight-Seeing Bus tour around the city. It will certainly be an adventure and we can't wait!

The overall purpose of the trip will be to enhance historical learning, with particular emphasis on the Tudor period, although for many the opportunity to visit London in itself will be purpose enough, as well as the chance to learn how to be independent and organised away from home.

The total cost of the trip will be £225. If your child is eligible for free school meals (see criteria in our Charging and Remissions Policy on our Academy website) there is a reduced cost of £195. There will be the opportunity to pay the balance in instalments and you will receive further details as to when the balance is due with your receipt for the deposit.

If your child would like to join us on this amazing adventure, please pay the £50 non-refundable deposit on Bromcom and tick to give consent **BY 30th SEPTEMBER**.

Yours sincerely,

Year 4 Teachers

This slip only needs to be completed if you have been unable to pay on Bromcom

My child _____ in class ____ would like to be included in the Yr4 London Residential in June 20XX.

I enclose the non-refundable deposit for £50 (cheques made out to

Parent/carer signature: _____

Document Control

Changes History

Version	Date	Owned and amended by	Recipients	Purpose
1.0	4 th June 2018	Chris Chamberlain	All OCL Principals	Updated legislation
1.2	24 th September 2018	Chris Chamberlain	All OCL Principals	Updated legislation
1.3	April 2023	Finance Directorate	All OCL Principals	Review

Policy Tier

- Tier 1
 Tier 2
 Tier 3
 Tier 4

Owner

Mark Orrell, Director of Finance

Contact in case of query

Mariam Homer, EA to the Director of Finance and Financial Controller

Approvals

This document requires the following approvals.

Name	Position	Date Approved	Version
Directors' Group	When new draft presented for approval	Not applicable	

Position with the Unions

Does the policy or changes to the policy require consultation with the National Unions under our recognition agreement?

- Yes
 No

If yes, the policy status is:

- Consulted with Unions and Approved
 Fully consulted (completed) but not agreed with Unions but Approved by OCL
 Currently under Consultation with Unions
 Awaiting Consultation with Unions

Date & Record of Next Union Review
Not applicable / Insert

Location

Tick all that apply:

- OCL website

OCL Charging and Remissions Policy

V1.3

Finance / April 2023

- Academy website
- Policy portal
- Other: state

Customisation

- OCL policy
- OCL with an attachment for each academy to complete regarding local arrangements
- Academy policy
- Policy is included in principals’ annual compliance declaration

Distribution

This document has been distributed to:

Name	Position	Date	Version
All OCL Principals	Principals	27/3/23	1.3

