



# Great Marlow School

*Excellence • Compassion • Integrity*

## CHARGING & REMISSIONS

Recommended by the Leadership Team:

November 2023

Approved by the Finance & Resources Committee (or Policies Sub Committee): December 2023

Planned to be Adopted by Board of Trustees:

December 2023

Review Due:

Autumn Term 2024

Indicate as appropriate:

☒ There **has been** a change to the previous policy  
or  
There has not been a change to the previous policy

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## **1. Introduction**

The school recognises the valuable contribution that the wide range of additional activities, including clubs and visits, can make towards a students' education. The schools aims to promote and provide such activities as part of a broad and balanced curriculum for the students of the school and as additional optional activities.

The relevant statutory provisions are contained in Chapter III of Pt VI of the Education Act 1996. This requires the Trustees to determine and keep under review a Charging and Remissions Policy. This policy has also been reviewed in accordance with the requirements of the Equality Act 2010.

There are two types of financial contributions for which parents can be asked in relation to educational activities:

- Voluntary contributions
- Permitted charges

They have different limitations as set out below.

## **2. Voluntary Contributions:**

There is no limit to the level of voluntary contribution that may be asked for or any restriction on the way in which it is used. Voluntary contributions therefore, can be used to subsidise parents of students who are unwilling, or unable to pay, the charges made. Voluntary contributions can be used to pay the travel and accommodation costs of accompanying teachers or adults.

Letters requesting a voluntary contribution for an activity must indicate that there is no obligation to contribute and that students will not be treated differently according to whether or not their parents have made any contribution in response to the request or invitation.

Design Technology actively seek donations to enable the department to provide enhanced materials. These funds are restricted for use by the department and do not form part of the school curriculum expenses.

### ***i. Lockers***

The school has purchased a number of lockers located cross the school site. These were funded by unrestricted reserves. The lockers are offered to students to use during their time as a student through a single fixed sum of £30. The student then provides their own padlock. No rights of ownership exist by the students and the school reserves the right to transfer the student to an alternative location. Similarly, as the student progresses through to the school, then they can request an alternative location to reflect changes in their Tutor Room. The use of the locker cannot be passed on to other students or siblings and refunds will not be made unless within the first year of use. Students are responsible for ensuring that the locker is kept padlocked and the school is not responsible for goods stored inside.

### ***ii. Sixth Form Amenities***

The school provides a high-quality facility which is of a significantly higher standard than your average school sixth form. In order to maintain the facility for future cohorts we ask that a £30 contribution is paid annually for the continued upkeep and maintenance of this high-quality learning environment.

## **3. Permitted Charges**

Permitted charges are a direct request to cover certain costs involved with a school activity or visit. No charge can be made in respect of education provided during school hours (which excludes the midday break). Furthermore, no charge can be made for any education provided outside school hours if this forms part of the syllabus for a public exam, or as part of the National Curriculum or religious

education (non-chargeable education). A charge may be made, however, for board and lodgings on any residential educational visit (subject to the provisions of the school's remissions policy).

**iii. Materials & Textbooks**

Where a student or parent wishes to retain items produced as a result of art, craft and design, or design and technology, a charge may be levied for the cost of the materials used. In the case of Food Technology, students usually provide their own ingredients, but if the student forgets, the school provides the ingredients and levies a charge.

The school will provide a number of textbooks for use in lessons across all subjects where appropriate. However, we believe that in some subject areas that it is hugely beneficial for students to have their own copy, which they can annotate to aid their studies. The school is able to purchase these textbooks on behalf of the students at a price that is usually lower than can be purchased by individuals. The school will also source other study materials that will enhance the learning and progress of students, such as revision guides and online materials and enable these to be purchased as cost efficiently as possible.

**iv. Music Tuition**

The school levies charges in respect of individual music tuition, and group music tuition up to and including 4 persons, if the teaching is not an essential part of either the National Curriculum or a public examination syllabus being followed by the student. For students and their parents that wish to purchase a musical instrument themselves, we can reclaim the VAT on the purchase and pass on this saving.

**v. Residential Activities/Activities Outside School Hours**

If the activity is held outside school hours and is education other than non-chargeable education, then it is regarded as an "optional extra". A charge may be made for the full cost of the activity but must not exceed the actual cost of providing the activity. The charge may include the costs of travel, board and lodgings, additional staff costs, entrance fees, insurance, materials and equipment. However, the charge made to individual parents cannot include any cost added to subsidise parents of children who are unwilling or unable to pay the charge.

**vi. When is an activity held in school hours?**

**A day visit** is in school hours if:

- 50% or more of the total time (including travelling) occurs in school hours.
- As mentioned above school hours do not include the normal midday break.

**A residential visit** is in school hours if:

- The number of school sessions missed is 50% or more than the number of half days spent on the visit (including travel).
- A school session equates to a registration session (i.e. 2 per day).
- A half-day is a 12 hour period ending at midday or midnight.

**4. Examination Entries**

No charge when:

- an exam is part of the curriculum.
- an exam is on the school's set examinations list.
- the pupil has been prepared for that exam by the school.
- the exam is not on the set list, but has been arranged by the school.

A charge will be levied in respect of examination entries for students where the school has not prepared the student for the examination.

A charge will be levied in respect of examination entries for students where:

- - the school has prepared the student for the examination and it considers that for educational reasons the student should not be entered and
- - the student's parent/guardian wishes the student to be entered (or student him/herself when over 18 years old).

In these circumstances, if the student subsequently passes the examination, the school may refund the cost.

- A charge will be levied for students re-sitting an examination.
- A charge will be levied where a student fails, without good reason, to complete the requirements of any public examination where the school paid or agreed to pay the entry fee.

A charge may be levied if a student wishes to appeal an examination result or request a remark. If the appeal or remark results in an improvement in the overall grade the fee will be refunded.

## **5. Damage/Loss to Property**

A charge will be levied in respect of wilful damage, neglect or loss of school property (including premises, furniture, equipment, books or materials), the charge to be the cost of replacement or repair, or such lower cost as the Headteacher may decide.

## **6. Lettings**

The school will make its facilities available to outside users at a charge of at least the cost of providing the facilities. The scale of charges will be determined annually by the Finance & Resources Committee and approved by the Board of Trustees.

## **7. DBS checks**

The school will cover the cost of DBS checks for all employed staff. The school will cover the cost of DBS checks for volunteers requested by the school.

## **8. MiDAS (Minibus Competency Training)**

The school will cover the cost of providing MiDAS for any employed staff where it is identified that there is a requirement. The school will cover the cost of MiDAS training for volunteers requested by the school.

## **9. Other Charges**

The Headteacher, Finance & Resources Committee or Board of Trustees may levy charges for miscellaneous services up to the cost of providing such services e.g. for providing a copy of an OFSTED report, some items in the School Publication Scheme, lockers, revision guides.

For 6<sup>th</sup> Form students a charge will be made for a) contribution to the 6<sup>th</sup> Common Room Fund and b) textbook deposit. The textbook deposit charge will be refunded when a student leaves the 6<sup>th</sup> Form subject to return, in good condition, of all textbooks issued.

## **10. Remissions Policy**

Where non-chargeable education is provided during a residential visit, then the parents of a student who is eligible for free school lunch shall receive a complete remission of any charges that would otherwise be payable in respect of board or lodgings.

The school will follow the most up to date criteria for the definition of eligibility of Free School Meals and works with the Local Authority for the management of eligible students.

## **Appendix to Charging & Remissions Policy**

### **11. Introduction**

This appendix has been written to inform parents/carers of the rules that determine how and when refunds will be made in relation to a school trip/activity. By making a donation to a school trip/activity, parents/carers are agreeing that their contribution will be used as set out below.

### **12. Budgets & Review**

The cost of each visit has a budget. The requested contribution from parents/carers is based on the premise that each trip/activity's costs will match exactly to the budget. Whilst most trips/activities come in on budget there will always be some that vary.

Occasionally, between the time of booking the trip and receiving payments and the event taking place; or even after the event has taken place, additional costs become apparent.

Where this occurs before the event, the school will assess the viability of continuing with the event. Where the deficit is regarded as being sufficiently low value, it may be decided, that the deficit will be covered by drawing upon the reserves held in the school fund, under the category of Unrestricted Funds. Costs are often invoiced after the event and it is not until all costs have been received that a proper assessment can be made. As such the school will review all closed trips once a term. This process will include an assessment of the direct costs of administering the trip (to include merchant fees applied for the processing of online payments) but will not include administrative staff costs.

### **13. Deficits**

Where a deficit is apparent after the event has taken place, this will be covered by drawing upon the reserves held in the school fund under the category of Unrestricted Funds.

### **14. Surplus**

Where the total trip actuals costs are lower than those anticipated, the school will calculate this as a surplus per student, by dividing total trip actuals costs (for fee paying students) by the number of pupils who paid.

In the event that the surplus per student exceeds £15 per head or 5% of the cost per student, whichever is the lower amount, the full surplus will be refunded.

Where the surplus per student is less than this amount, then the total surplus will be transferred to the School Fund under the category of Unrestricted Funds.

The £15/5% limit is set to cover the disproportionate administrative costs of processing large quantities of small refunds. This value will be reviewed by the Finance Committee each time the policy is reviewed.

Where refunds are processed, these will be made using the same method as the payment. i.e. in most cases a credit via WisePay. If the transaction is too old, the refund will be made by BACS.

### **15. Refunds for where a student is unable to attend a Trip/Activity**

Once a payment has been made to the school for a trip, the school is under no obligation to return that donation. Indeed, in most cases this will be impractical as the contribution per student has already been set to cover costs and in the event of a refund the trip would overspend. However the school recognises that there may be extenuating circumstances and any such request will be judged on merit. Requests for refunds must be put in writing to the event organiser with an explanation of the reason. The final decision will be made by the Headteacher or the Commercial & Operations Director.

### **16. Foreign Currency Advances**

At the end of visits any unused currency that the school has taken is banked and put back into the trip fund before any surplus or deficit is calculated. It is not possible for the school to bank surplus coins. Therefore these cannot be transferred back into the fund and the school donates these to charity. By making the donation for the trip/activity, parents/carers are agreeing to the school doing this.