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# THE HEATH ACADEMY TRUST

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## CHARGING AND REMISSIONS POLICY

Version 2022-1



*inspire transform together*

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The Heath Academy Trust  
Registered Address: St James CE First and Nursery School, Park Lane, Alderholt, Dorset, SP6 3AJ  
Registered in England and Wales  
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### Definitions

#### Section 1: The MAT

"the Academy Trust" and "Trust"	mean the Heath Academy Trust Company.
"the Board"	means the Board of Directors of the Heath Academy Trust Company.
"the Directors"	refers to the group of (up to 12) Directors who make up the Board, and who are also the Heath Academy Trust's "Trustees" under charity law.
"Finance Committee"	refers to the Finance and Audit Committee formed by the Board to manage the financial affairs of the Trust.
"Accounting Officer"	is a role held by the Chief Executive Officer ("CEO") of the Trust, and one which includes a personal responsibility for the financial resources under the Trust's control. They are accountable for the Trust's financial affairs.
"Chief Finance Officer" (CFO)	is the Trust's finance director, and also the Trust Business Manager, to whom the Accounting Officer delegates responsibility for delivery of the Trust's financial processes and reports, and for the oversight and consolidation of the Academies' financial data.
"Trust Business Manager" ("TBM")	Fulfils the CFO role within the Trust, including compliance and statutory returns, as described in the Academies' Financial Handbook.
"Leadership Team"	is a team representing the Academies, consisting of the Headteachers and the CEO, and the TBM.

#### Section 2: The Schools

"Academy"	One of the six schools making up the Heath Academy Trust.
"Academies"	All of the six Academies.
"School"	means an Academy within the Trust.
"Finance Officer"	The person responsible for the day-to-day management of an Academy's financial operations.
"LSC Member"	means a formally elected and appointed member of a Local School Committee (generally referred to as the LSC).
"Headteacher"	means the senior person at an Academy who may also be an Executive Headteacher and/or elected as a Director of the Board.
"School's Leadership Team"	

	A group within each School consisting of the Headteacher, senior staff and the Local School Committee.
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## 1.0 Purpose

We believe that all our students should have an equal opportunity to benefit from school activities and visits (curricular and extra-curricular) independent of their parents' financial means. This charging and remissions policy describes how we will do our best to ensure a good range of visits and activities is offered and, at the same time, try to minimise the financial barriers which may prevent some students taking full advantage of the opportunities.

The Heath Academy Trust is committed to ensuring consistency of treatment and fairness and will abide by all relevant equality legislation.

The CEO, Directors, Headteacher, staff and LSC Members will ensure that the following applies:

## 2.0 Activities Where No Charge Will Be Applied

- education provided during school hours (including the supply of any materials, books, instruments, or other equipment)
- 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 student is being prepared for at the school, or part of the school's basic curriculum for religious education
- tuition for students learning to play musical instruments (or singing) if the tuition is required as part of the National Curriculum, or part of a syllabus for a prescribed public examination that the student is being prepared for at the school
- entry for a prescribed public examination, including examination resit(s), if the student has been prepared for it at the school. If a student fails, without good reason, to meet any examination requirement for a syllabus, a charge will be made
- education provided on any trip that takes place during school hours if it is part of the National Curriculum, or part of a syllabus for a prescribed public examination that the student is being prepared for at the school, or part of the school's basic curriculum for religious education
- 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 student is being prepared for at the school, or part of the school's basic curriculum for religious education
- supply teachers to cover for those teachers who are absent from school accompanying students on a residential trip
- transport provided in connection with an educational trip.

## 3.0 Activities Where Charges May Be Applied

### • Trips and Visits

Costs may be charged to cover the full cost of non-residential trips and visits.

- **Residential Trips and Visits**

Costs may be charged to cover the full cost of the trip, including board and lodging. However, if the trip is a compulsory part of the syllabus for a public examination, parents in receipt of certain benefits (see point 4 below) will be informed that full remission will be provided by the school.

When a trip is offered to more students than places available, parents will be notified of the policy for allocating places.

- **Music Tuition**

Music tuition for individuals or groups of students, provided that the tuition is provided at the request of the pupil's parent

- **Enrichment Activities**

Enrichment activities which may be charged for are regarded as 'optional extras'. These activities do not form part of the National Curriculum, or part of a syllabus for a prescribed public examination, or part of the school's basic curriculum for religious education. Charges will not exceed the actual cost of provision.

#### **4.0 Families Qualifying For Remission or Help With Charges**

In order to remove financial barriers from disadvantaged students, the Board has agreed that some activities and visits where charges can legally be made will be offered at no charge or a subsidised charge at the discretion of the Headteacher. This remissions policy sets out the circumstances in which charges will be waived. Criteria for remission is based on those that qualify for the Pupil Premium. The amount of remuneration will be in line with the Pupil Premium policy.

#### **5.0 Additional Considerations**

The Board recognises its responsibility to ensure that the offer of activities and educational visits does not place an unnecessary burden on family finances. To this end we will try to adhere to the following guidelines:

- we have established a system for parents to pay in instalments
- when an opportunity for a trip arises at short notice it may be possible to arrange to pay by instalments beyond the date of the trip
- we acknowledge that offering opportunities on a "first pay, first served" basis discriminates against students from families on lower incomes and we will avoid that method of selection

#### **6.0 Arrangements for Monitoring and Evaluation**

The Local School Committees will monitor the impact of this policy by receiving on an annual basis, a financial report on those activities that resulted in charges being levied, the subsidies awarded (without giving names) and the source of those subsidies. It will seek to evaluate the impact of the school's extended services on those children most in need of additional support.

