



The Olympus Academy Trust Charging and Remissions Policy

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On Trust Website?	Yes
On School Websites?	Yes

Amendment History

Version	Amendment Date	Author	Amendment Summary
v8	March 2016	Head of Business Operations	<ul style="list-style-type: none"> • Approved by Finance & Risk Committee • Approved by Board of Trustees
v9	June 2017	Head of Business Operations	<ul style="list-style-type: none"> • Approved by Finance & Risk Committee • Approved by Board of Trustees
v10	June 2018	Head of Business Operations	<ul style="list-style-type: none"> • Approved by Finance & Risk Committee • Approved by Board of Trustees
v11	June 2019	Head of Business Operations	<ul style="list-style-type: none"> • Approved by Finance & Risk Committee • Approved by Board of Trustees

v12	July 2020	Head of Business Operations	<ul style="list-style-type: none"> • Annual Review. • No Amendments. • Approved by Finance & Risk Committee.
v12.1	31 st March 2021	Head of Business Operations	<ul style="list-style-type: none"> • New Trust document version system implemented. • Appendix A - Addition of 'Replacement lanyard charge' for Winterbourne Academy
v12.1	1 st April 2021		<ul style="list-style-type: none"> • Approved by the Board of Trustees
v13.0	1 st April 2021		<ul style="list-style-type: none"> • Policy Issued
v14.0			<ul style="list-style-type: none"> • Change eligibility of support for Duke of Edinburgh trips. Update charged items in appendices
v15.0	27 th January 2023	Financial Controller	<ul style="list-style-type: none"> • Annual Review

1. **Purpose of the Policy**

- 1.1 The Board of Trustees (Board) of the Olympus Academy Trust (Trust) recognises the valuable contribution that school and extra-curricular activities, including clubs, theatre groups, trips and residential experiences make for our learners.
- 1.2 The Board aims to promote and provide such activities as part of a broad and balanced curriculum for all learners along with additional extra-curricular activities.

2. **Consultation Process**

- 2.1 The policy was developed in consultation with staff from all schools and the Finance and Resources Committee.

3. **Relationship to Other Policies**

- 3.1 Financial Regulations Manual (this is Appendix E)
Educational Trips Policy
Lettings Policy
Freedom of Information Publication Policy

4. **Voluntary Contributions and Charges**

4.1 **Voluntary Contributions for School Activities**

The Trust reserves the right to request voluntary contributions for the benefit of the schools or any school activities. Where a request is made for a voluntary contribution from parent(s)/carer(s) for an activity, the school will advise parent(s)/carer(s) at the outset and of the basis on which places will be allocated. For any such activity parent(s)/carer(s) are under no obligation to make any contribution but if insufficient contributions are received to cover the cost of the activity then the activity will be cancelled. If a parent/carer is unwilling or unable to pay, their child will still be given an equal chance to go on the visit.

4.2 **Optional Extras**

Charges may be made for some activities that are known as "optional extras" i.e. Curriculum Day trips, ski trips, events during enrichment week and enhanced activities for session 16 or RAISE days in secondary phase (Years 7-11) and school camp and day trips in the primary phase (Reception class to year 6).

The Board agrees that parents should be asked to pay 100% towards the cost of these activities. Some learners may be eligible for support towards the cost of these activities; any financial support offered will be subsidised by the Trust.

- **Primary Phase**

The Trust can offer support of up to 100% towards the cost of these trips if a learner is in receipt of free schools meals or is recorded as eligible for pupil premium

The Trust will consider offering support of 50% towards the cost these trips families of a learner are in receipt of Working Tax Credit or Universal Credit and where the household income is less than £16,190

Requests for support should be made in writing to the Headteacher who will arrange an appointment to discuss; evidence of qualifying benefits and/or proof of income will be required. Evidence of qualifying benefits will be checked on an annual basis.

- **Secondary Phase**

The Trust can offer a learner in receipt of free school meals or eligible for pupil premium 100% support towards ESSENTIAL school trips for GCSE/BTEC per academic year.

The Trust can offer a learner in receipt of free school meals the following support per academic year:

- 100% support for 1 UK residential trip; OR
- 50% support for 1 NON UK residential trip;
- 100% support towards a maximum of 3 day trips during enrichment week.

Parent(s)/carer(s) will be required to pay a holding deposit of 10% for residential trips which will be returned after the learner has attended the trip. If a learner cannot attend the trip for whatever reason this deposit will not be returned.

The Trust can offer families of a learner that are in receipt of working tax credit or Universal Credit and where the household income is less than £16,190, the following per academic year:

- 50% towards ESSENTIAL school trips for GCSE/BTEC;
- 50% support for 1 UK residential trip;

OR

- 25% support for 1 NON UK residential trip;
- 50% support towards a maximum of 3 day trips during enrichment week.

Requests for support should be made in writing to the Finance Manager; evidence of qualifying benefits and/or proof of income will be required. Evidence of qualifying benefits will be checked on an annual basis.

- **Duke of Edinburgh Trips**

The Trust can offer support of up to 100% towards the cost of these trips if:

- a learner is in receipt of free schools meals or is recorded as eligible for pupil premium
- Families of a learner are in receipt of working tax credit or Universal Credit and where the household income is less than £16,190

Requests for support should be made in writing to the Finance Manager; evidence of qualifying benefits and/or proof of income will be required. Evidence of qualifying benefits will be checked on an annual basis.

- **Post 16 Phase (Years 12 and 13)**

Learners eligible for the bursary grant can request support for the cost of any schools trips designated by the school as essential to their course to be met by the bursary grant. The proportion of the trip cost that can be covered by the bursary grant will be determined by the school each year.

To apply for Bursary funding please see application form – Appendix 3

There may be occasions where the above criteria are not considered to be appropriate and the application will be dealt with on an individual basis.

4.3 **School Uniform**

- **Primary Phase**

The Trust can offer support of 100% towards the cost of two of each item of essential uniform per academic year if:

- a learner is in receipt of free schools meals or is recorded as eligible for pupil premium

The Trust can offer support of 50% towards the cost of two of each item of essential uniform per academic year if:

- families of a learner are in receipt of working tax credit or Universal Credit and where the household income is less than £16,190.

Requests for support should be made in writing to the Headteacher or Finance Manager who will arrange an appointment to discuss; evidence of qualifying benefits and/or proof of income will be required. Evidence of qualifying benefits will be checked on an annual basis.

Each school will designate which items of uniform are essential.

- **Secondary Phase**

The Trust will offer support of 50% towards the cost of two of each item of essential uniform per academic year if:

- a learner is in receipt of free schools meals

The Trust will offer support of 25% towards the cost of two of each item of essential uniform per academic year if:

- families of a learner are in receipt of working tax credit and where the household income is less than £16,190

Requests for support should be made in writing to the Finance Manager; evidence of qualifying benefits and/or proof of income will be required. Evidence of qualifying benefits will be checked on an annual basis.

Each school will designate which items of uniform are essential.

4.4 **Individual Instrumental Tuition**

- **Primary Phase**

The Trust can offer support of up to £50 towards the cost of a 10 week block of instrumental lessons if:

- a learner is in receipt of free schools meals or is recorded as eligible for pupil premium

The Trust can offer support of £25 towards the cost of a 10 week block of instrumental lessons if:

- families of a learner are in receipt of working tax credit and where the household income is less than £16,190

Requests for support should be made in writing to the Headteacher; evidence of qualifying benefits and/or proof of income will be required. Evidence of qualifying benefits will be checked on an annual basis. In exceptional circumstances the school may offer a different level of financial support and will be at the discretion of the Headteacher.

- **Secondary Phase**

The Trust can offer support of £25 towards the cost of a 10 week block of instrumental lessons if:

- the instrumental lessons are designated by the school as essential to studying a relevant GCSE or BTEC course and the learner is eligible for pupil premium

These lessons may be timetabled outside of the normal school day and the learner must attend on a regular basis.

The Trust will offer support of £25 towards the cost of a 10 week block of instrumental lessons if:

- a learner is in receipt of free schools meals
- families of a learner are in receipt of working tax credit or Universal Credit and where the household income is less than £16,190 and they write to the school requesting support.

Requests for support should be made in writing to the Finance Manager; evidence of qualifying benefits and/or proof of income will be required. Evidence of qualifying benefits will be checked on an annual basis.

In exceptional circumstances the school may offer a different level of financial support and will be at the discretion of the Headteacher. If you think this may apply to you please contact the Business Manager.

- **Post 16 Phase**

Learners eligible for the bursary grant can request the cost of these instrumental lessons, if designated by the school as essential to their course, to be met by the bursary grant. The proportion of the cost of these lessons that can be covered by the bursary grant will be determined by the school each year.

To apply for Bursary funding please contact your school.

4.5 **Other Charges**

The Trust will charge for the cost (or request the provision of them by parent(s)/carer(s)) of some materials, ingredients, equipment for the following subjects: Art; Craft, Design and Technology; Catering/Cookery; Textiles and Media Studies. Charges will be advised on an individual basis and will be based on the cost of materials/ingredients required.

- **Secondary Phase**

The Trust will offer 100% support towards the cost of essential educational resources such as books, protective clothing and materials required for curriculum courses if:

- a learner is in receipt of free schools meals or is recorded as eligible for pupil premium

The Trust will offer support of 50% towards the cost of essential educational resources such as books, protective clothing and materials required for curriculum courses if:

- families of a learner are in receipt of working tax credit or Universal Credit and where the household income is less £16,190

Requests for support should be made in writing to the Finance Manager; evidence of qualifying benefits and/or proof of income will be required. Evidence of qualifying benefits will be checked on an annual basis.

If a learner requires a replacement for a lost or broken item listed in Appendix 1 the Trust will replace up to two items in total free of charge per academic year if:

- a learner is in receipt of free schools meals or is recorded as eligible for pupil premium.
- **Post 16 Phase**

Learners eligible for the bursary grant can request for the cost of essential educational resources such as books, protective clothing and materials required for "A" Level courses to be met by the bursary grant.

To apply for Bursary funding please contact your school.

Details of which information requests are chargeable and which are available free of charge can be found the Trust's Freedom of Information Publication Policy.

4.6 Examination Fees

- Where a learner has not been prepared for an examination by the school, the Trust will make a charge for the cost of entering the learner for the examination.
 - Learners wanting to take an examination in a language not taught in school should contact the school as the school may agree to meet the cost of the examination
- If a learner fails without good reason to complete the examination requirements for any examination for which the school has paid (or is liable to pay) an entry fee, then the Trust will recover the fee from the parent(s)/carer(s).
- Where a parent/carers requests that a learner re-sits an examination the parent/carers will be required to pay the appropriate re-sit fees. Where the Trust requests a learner to re-sit an examination, the Trust will bear the cost of the re-sit fee.
- External candidates will normally be required to pay an administration fee to the school in addition to any fees due to an Examination Board. This fee will be £30 per subject.
- Where a learner is eligible for the bursary grant the Trust will offer support of 50% towards the cost of any re-sits.

4.7 Breakfast Clubs and After Schools Club

For Breakfast Clubs and After School Clubs held on the school premises the Trust may offer support towards the cost of these clubs if a child is in receipt of free school meals or if families of a learner are in receipt of Working Tax credit or Universal Credit and have an income less than £16,190. Requests for support must be made in writing to the Headteacher.

4.8 Other Activities

The Trust may request a voluntary contribution to support other activities taking place during school hours e.g. theatre groups.

4.9 Outside

The Trust may permit outside organisations to charge parents when such an organisation is acting independently of the school.

4.10 Lettings

The Finance and Resources Committee will review lettings charges on an annual basis. Hirers will be advised of charges prior to commencement of their letting period.

4.11 Freedom of Information Requests

The Trust reserves the right to make charges for some freedom of information requests. Many of the Trust's policies are available free of charge on the schools' and Trust's websites:

www.olympustrust.co.uk
www.abbeywoodschool.com
www.bradleystokecs.org.uk
www.callicroftprimary.org.uk
www.charboroughroadprimary.org.uk
www.meadowbrookprimary.co.uk
www.filtonhillprimary.co.uk
www.patchwaycs.org.uk
www.stokelodgeschool.co.uk
www.winterbourneacademy.org.uk

4.12 General

- The Trust may, from time to time, amend the categories of activity for which a charge may be made.
- Nothing in this policy statement precludes the Trust from inviting parent(s)/carer(s) to make a voluntary contribution towards the cost of providing education for learners.
- Where a learner owes money for catering, a school run breakfast or after school clubs or for a previous activity, the Trust has agreed that funds provided by parent(s)/carer(s) to support any future educational trips etc. will have to be used to clear the monies owing. A further request will then be made to parent(s)/carer(s) to cover the cost of the future activity.
- Year 11 learners will be required to return all school resources and pay all outstanding monies before leaving. The Trust reserves the right to charge for materials and resources not returned.

- Year 6 learners will be required to return all resources borrowed from the school and pay all outstanding monies before leaving. The Trust reserves the right to charge for materials and resources not returned.

5. Refunds

- 5.1 Should a visit/activity be cancelled by the school then contributions made by parent(s)/carer(s) will be refunded in full if the money is held by the school. If a trip is cancelled but the funds have already been paid to a travel company then contributions made by parent(s)/carer(s) will be refunded only if the money is claimed back via the insurer. The school is insured by the Risk Protection Arrangement and terms of the insurance can be found at:

<https://www.gov.uk/guidance/the-risk-protection-arrangement-rpa-for-schools#what-rpa-covers>

- 5.2 In the event that a parent/carer no longer wishes their child to participate in an activity or a learner is unable to attend a day trip due to illness the parent/carer can request a refund. Where a deposit/advance payment has been paid the school will only make a refund for the costs not incurred by the school. It is unlikely that the cost of transport or any pre-paid tickets/entrance fees can be refunded.
- 5.3 If a learner is unable to attend a residential trip because of ill health or an accident and the school is unable to obtain a refund from the travel company then a letter will be required from their doctor with details of the illness/accident in order to make a claim through the insurance policy.
- 5.4 We reserve the right to withdraw learners from any trip/event/activity if they have shown themselves unable to co-operate in class or they have a poor record of behaviour. Under these circumstances the cost of any payments already made will not be refunded.
- 5.5 All refunds need to be claimed within six months of the date of cancellation.
- 5.6 The Trust hold funds on behalf of third parties such as catering refunds. All catering refunds need to be claimed within six months of the date that pupil/student was removed from the school roll.

6. Damage, Loss of Equipment

- 6.1 Learners are expected to treat all school property with care and respect. Should any non-accidental damage be caused by a learner, or resources such as books and equipment lost while in the possession of a learner, then the Trust reserves the right, after investigation, to charge the parent(s)/carer(s) the economic cost of repairing, making good or purchasing a replacement.

7. Monitoring & Review

The Trust will review this policy in an annual basis, assess its implementation and effectiveness by reviewing all financial support provided under this policy and recommend any opportunities for change to enhance existing practice.

APPENDIX 1

CHARGES FOR OTHER ITEMS

Charges will be made for the following items, please contact the individual school for the prices:

Abbeywood Community School

Locker Rental
Replacement locker key

Bradley Stoke Community School

Locker rental
Locker key deposit
Replacement locker key
Replacement planner
Replacement lanyard

Patchway Community School

Locker Rental
Locker Key Deposit
Replacement Locker Key
Replacement Planner
Replacement Pencil case

Winterbourne Academy

Replacement lanyard

Please note that the charges for replacement items may differ from school to school based on costs incurred and charges may be varied should costs to the schools change.

APPENDIX 2

SUMMARY OF CHARGES AND SUPPORT AVAILABLE

PRIMARY PHASE (Reception to Year 6)		
	<i>Eligible for Pupil Premium including families in receipt of Free School Meals (FSM)</i>	<i>Household income under £16,190 p.a. and receiving Working Tax Credit or Universal Credit</i>
School Camp and day trips	100% support	50% support
School Uniform (see above for restrictions)	100% support	50% support
Music Lessons	£50 per 10 week block of lesson	£25 per 10 week block of lessons
SECONDARY PHASE (Year 7 – Year 11)		
	<i>Receiving FSM</i>	<i>Household income under £16,190 p.a. and receiving Working Tax Credit or Universal Credit</i>
Curriculum School Trips	100% support (including pupils eligible for pupil premium)	50% support
School Trips - residential	100% support for ONE UK residential trip per academic year (10% holding deposit required) OR 50% support for ONE NON UK residential trip per academic year	50% support towards ONE UK residential trip per academic year OR 25% support towards ONE NON UK residential trip per academic year
Duke of Edinburgh trips	100% support	
Day trips during enrichment week	100% for a maximum of 3 days trips	50% support for a maximum of 3 day trips
School Uniform (see above for restrictions)	50% support	25% support
Music Lessons	£25 per 10 week block of lessons	£25 per 10 week block of lessons
Other charges: BTEC/GCSE Course Materials	100% support (including pupils eligible for pupil premium)	50% support
Appendix 1 items	2 replacement items in total free of charge per academic year	