

MST and Charging Policy

Approval Body:	MST Finance Committee
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Implementation Date:	10 th November 2022
Review Date:	November 2024
Policy Version:	3

Version	Reviewed	Changes since last version
1	November 2018	<ul style="list-style-type: none">• New Policy
2	November 2020	No significant changes – part of the biennial review
3	November 2022	No significant changes – part of the biennial review

This policy has been adopted by the Mulberry Schools Trust and will be applied to all schools which belong to the Mulberry Schools Trust.

This document outlines the Trust's policy towards contributions and charges for Mulberry Schools Trust. This policy contains the Trust's policy of claiming contributions from individual schools and also for the overall charging framework in respect of individual schools to pupils and parents.

Central Support Functions and Contributions by each school within MST

Central Support Function – MST has a policy of retaining 5% of budgets from all schools within the Trust in order to fund the core central strategic support for all schools. In essence the aim is to benefit from efficiencies by rationalising support functions such as Finance, Estates, ICT, Executive support and HR services to operate across the trust from a central hub. Due to the nature and timing of the finances involved, in order to realise the efficiencies the central support function needs to be implemented when the trust has enough schools at a settled financial stage to be able to contribute and benefit from a central core function.

Contribution by schools – It is recognised that with the approach of creating new schools and the development period associated with new schools that a 5% recharge is dependent on the school being financially sound and stable before it is able to contribute. This is also the case for a school joining the trust such as MAS where the finances are finely balanced. All new schools' financial models take into consideration that at least for an initial 2 year period any new school will not contribute 5% of its funding to the Trust. This can then be reviewed and individual circumstances of each of the schools taken into consideration before a requirement to contribute 5% is implemented, a phased approach (building towards 5%) may also be possible. The aim is that the support processes of each of the schools can be made more efficient and rationalised once the school is more established, in other words if support cost savings are made these will effectively mitigate some of the 5% contribution from an individual schools perspective. Other options where a full 5% contribution may not be possible will include:

- A gradual phasing period towards a 5% contribution from individual schools.
- A notional calculation which shows the net benefit or cost to each individual school where a 5% contribution is not taken. This will provide transparency across the trust in respect to staff within individual schools also carrying out trust wide job roles/functions.

Any contributions by schools will always be carried out in consultation with the school and in line with Department for Education requirements an appeal process will be available in the event that an individual school does not agree with the contribution set for the school. Contributions will be reviewed annually.

Charging for school activities

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 complies with our funding agreement and articles of association.

The Trust encourages all parents to contribute voluntarily towards those activities, important to the education of the pupils, which are not covered by the relevant Acts. Where charges can be levied, the monies will be recovered from parents, as provided by the Acts.

The Trust has outlined below the overarching areas covered by the policy, together with other areas where the need for charging exists under the terms of the legislation.

1. **Day and Residential Trips**

The Trust accepts that there has always been a tradition of schools organising educational visits for pupils, and that decisions as to whether or not such visits were organised were best left to individual LGB's and Heads in consultation with the CEO.

It is the intention of Mulberry Schools Trust to continue to offer day and residential courses to pupils where resources allow within individual school budgets.

2. A charge will be made for the cost of board and lodging for all residential visits, both in and out of school time, except in the case of necessitous pupils where remission may be available. Full or partial remission is at the discretion of the Head and LGB.

3. Educational visits taking place mainly during school time, for example, to museums, theatres and residential courses, may fall within the scope of the Act and where they do, they will 'not be chargeable.' Trustees have decided that all parents will be invited to make voluntary contributions, to include all travel and other costs, to cover such visits.

Prior to a visit which falls within the scope of the legislation, parents will be provided with a planned itinerary, and notification of the level of voluntary contribution which would make the visit financially viable. Should insufficient voluntary contributions be received, such visits may not take place.

4. **Examinations**

The School will normally pay entry fees to the exam boards. Parents will be informed as soon as possible for which examinations their child will be entered so that they have the opportunity to comment on decisions. Governors are responsible for determining whether there are educational grounds for **NOT** entering a pupil for an examination and have delegated this responsibility to the Head of the individual school.

If a pupil fails, without good reason, to complete the examination requirements for any public examination for which the school has paid, or is liable to pay the fee, then this can be recovered from the parent. Failure to complete the examination requirements might include failure to complete coursework requirements and/or failure to sit the final examination. There will be no charge for the re-checking of examination results where the school supports the need for re-checking.

5. **Miscellaneous**

Where materials or ingredients are required for classes such as Food Technology, it is expected that they will normally be provided by the parents. This is because it is anticipated that the materials and ingredients will be used to make an end product to be taken home or consumed by the pupil at school.

If parents do not wish to own the finished product they must indicate before the particular part of the course is started. These materials will then be provided free of charge.

Where ingredients or materials are NOT provided by parents, and parents have indicated in advance that they or the child wish to own the finished product, a charge may be made.

7. Wilful damage, or loss of school property by pupils, is chargeable under the legislation and the school will recover, from parents of offending students, the cost of repair, or replacement of the damaged or lost property.
8. Charges can be made to cover the cost of all education taking place mainly outside school hours, except where:
 - a) it is an essential requirement of a prescribed public examination;
 - b) it is provided to fulfil the statutory duties relating to the National Curriculum;
 - c) it fulfils statutory duties relating to religious education.
9. Charges can be levied for "Optional Extras" out of school hours and, where applicable, the school will levy appropriate charges to cover such items as:
 - a) students' travel costs;
 - b) students' board and lodging costs;
 - c) materials, books instruments and other equipment;
 - d) non-teaching staff costs;
 - e) teaching staff costs, including board and lodging, where staff are specifically engaged for the purpose of providing the chargeable activity;
 - f) extra curricular "Clubs".
10. Charges will not exceed costs.
11. Having issued this Charging Policy as required by legislation, we advise you that the policy and all applicable charges will remain effective from 1st September 2022 in accordance with the requirements of the Trust. The Charging Policy may be revised as necessary by the Trust and reviewed as required.

Throughout the policy document, reference is made to charging, voluntary contributions, recovery of monies and remittances. The administration and collection of such monies will be undertaken by the school. References to parents also include guardians / carers.

Initial enquiries about matters covered in this document should be addressed to the Head of the school or the teacher organising the activity concerned.