



# CHARGING IN SCHOOLS



## **CONTENTS**

Summary	2
Committee Recommendations	2
The Investigation Process	3
Findings of the Investigation	4
Conclusions	9
Annex 1: List of Witnesses	11
Annex 2: List of Children’s Services Scrutiny Committee Members	12
Annex 3: Oxfordshire County Council Charging Policy Summary for Parents	13

## **SECTION 1: SUMMARY**

The investigation was prompted by stakeholder representation from Abingdon Citizen's Advice Bureau (ACAB). The aim of the investigation was to consider whether schools within the Oxfordshire Local Education Authority (LEA) were implementing the model 'Charging Policy' and guidance, promulgated by the LEA to respond to legislative requirements (1996 Education Act). This report focuses on school trips, such as residential and non-residential activities and also on the cost of additional music tuition.

Government legislation currently states that Schools are unable to charge a child whose parent(s) or guardian(s) suffer financial hardship for extra-curricular activities such as residential trips and music tuition, however a request for voluntary contributions may be made by an individual school.

The Committee undertook this investigation in a Select Committee style to question witnesses. This Scrutiny Committee meeting took place on 23<sup>rd</sup> May 2006. Recommendations for the Cabinet were formulated by the Committee (listed below).

### **RECOMMENDATIONS**

The Committee **AGREED** to RECOMMEND the Cabinet :

- a) to re-issue a clear and unambiguous statement of law, practice and general policy on schools' charging on behalf of the authority as LEA;
- b) to ensure by authorising a short letter of guidance to schools, that letters issued by schools to parents concerning plans and arrangements for school trips make it clear that the schools can only request voluntary contributions;
- c) to ensure that schools' charging and remissions policies and examples of trip notices are included in the materials required for submission to each School Improvement Partner (for roll-out before September 2006 in Oxfordshire secondary schools and September 2007 in the County's primary schools). [For reasons of resource efficiency, details of schools' charging policies should be systematically included in the inspection materials to be produced under the regular schools monitoring regime.];
- d) to ask the Children, Young People & Families Directorate to prepare by September 2006 a detailed report on the sources and allocation of funding to alleviate social deprivation for consideration by the Children's Services Scrutiny Committee. This report should include a specific assessment on the dedication/earmarking of a proportion of such funds to increase access to participation in school trips (**particularly for schools in rural areas**) and, to this end, to henceforth include a specific line for school trips in the budget planning spreadsheet;
- e) to ask all schools to ensure their prospectuses include a summary of their charging policy;
- f) that the Council perform, in effect, a sponsoring role - acting as the contact between the local schools and businesses;

- g) to engage the support of local MPs to promote the benefits of links between businesses and schools;
- h) to request Officers to report back on the prospect of or possibility of reviewing the music tuition charging policy in the light of the costs for music tuition in primary schools.

## **SECTION 2: THE INVESTIGATION PROCESS**

### **AIMS OF THE INVESTIGATION**

The aim of the Children's Services Scrutiny Committee was to investigate the extent to which legislation and any other relevant guidance in relation to charging policies was being implemented in Schools within Oxfordshire. The Committee also hoped to make practical recommendations to the Cabinet using the evidence they gathered during the investigation.

The Committee was supported by Deborah Miller, Principal Committee Officer, Julian Hehir, Scrutiny Review Officer and Michael Chard, Scrutiny Research and Support Assistant.

### **BACKGROUND- CHARGING POLICY IN SCHOOLS IN BRIEF**

In general, no charge can be made for admitting pupils to maintained schools. Where education is provided wholly or mainly during school hours, it should be free. It is therefore not possible to levy a compulsory charge for transport or admission costs for swimming lessons or for visits to museums, etc. during school hours.

The LEA or governing body may not charge for anything unless they have drawn up a statement of general policy on charging. The Governing Body's Policy may be more or less generous than the LEAs, as long as it meets the requirements of the law (1996 Education Act).

#### **Voluntary Contributions**

Head teachers or governing bodies may ask parents for a voluntary contribution towards the cost of:

- Any activity which takes place during school hours;
- School equipment;
- School funds generally.

The contribution must be genuinely voluntary, though, and the pupils of parents who are unable or unwilling to contribute may not be discriminated against. Where there are not enough voluntary contributions to make the activity possible, and there is no way to make up the shortfall, then it may be cancelled.

#### **Residential Trips**

Schools are permitted to charge for the cost of board and lodging during residential school trips. This cost must not exceed the actual cost of the provision.

Where the trip takes place wholly, or mainly, during school hours children whose parents are in receipt of the following support payments will, in addition to having a free school lunch entitlement, also be entitled to the remission of these charges:

- Income Support;
- Income-based Jobseeker's Allowance;
- Support under part VI of the Immigration and Asylum Act 1999;
- Child Tax Credit provided the parent is not entitled to Working Tax Credit and their annual income does not exceed £13,230.

A similar entitlement applies where the trip takes place outside of school hours but it is necessary as part of the National Curriculum, forms part of the syllabus for a prescribed examination that the school is preparing the pupil to sit, or the syllabus for religious education.

### **Instrumental Music Lessons**

A charge may be made for instrumental music tuition for up to and including four pupils, unless the tuition forms part of the syllabus for a prescribed public examination (e.g. GCSE), that the school is preparing the child to sit, or is part of the National Curriculum or the syllabus for religious education, in which case a charge is not permissible.

### **HOW THE INVESTIGATION WAS CONDUCTED**

The Committee decided that it was important to hear from those people who had first hand knowledge of Charging Policy and the issues related to this in Oxfordshire. These included individuals from within Oxfordshire County Council (OCC) who were responsible for setting, implementing and distributing guidance to schools within the County i.e. Councillor Michael Waine the Cabinet Member for Schools Improvement and John Mitchell, Senior Education Officer.

In formulating the recommendations from this investigation, all of the information and views that Members heard was considered and evaluated. We are very grateful to all stakeholders who answered questions from the Members of the Scrutiny Committee in relation to their experiences of Charging Policy in Schools. We are thankful to the Abingdon Citizen's Advice Bureau who made a stakeholder representation to the Committee and also supplied evidence for consideration during the investigation. We are also grateful to the Officers of the County Council who were co-operative and candid in their answers to many probing questions.

## **SECTION 3: FINDINGS OF THE INVESTIGATION**

### **General Findings**

The main focus of the Committee's investigation was off-site, outside of core school hours trips including both residential and non-residential outings, additionally charging for music tuition was a topic also discussed by Members and witnesses.

Oxfordshire County Council is responsible for issuing guidance to all schools in relation to Charging Policies within the County whenever there is an alteration to

such documentation. When sent out this included a model charging policy for issues such as school trips and music tuition. The model policy stated that schools ‘cannot charge for activities which are part of the school day or part of the National Curriculum’ (See Annex 3). John Mitchell (OCC Education Officer) highlighted the fact that while education activities should be free, this is not always practical or within budget constraints;

*“We are talking about Education in the maintained sector where education should be free at the point of delivery..... in practice however, that is not always so simple to deliver”*  
(John Mitchell).

This is a view reiterated by Oxfordshire County Council’s Children, Young People and Families Directorate management team who support;

*“The principle that no pupil should be disenfranchised from educational opportunities because of their parents’ inability to pay and that every possible step should be taken to lessen the financial burden for those who find it hardest to contribute”*

This policy is in line with National government guidance that states that no student who suffers social deprivation should be unable to participate in extra-curricular activities such as residential trips or music tuition. The Investigation as a whole worked from the premise that while the majority of schools implemented the Charging Policy set out by Oxfordshire County Council there are cases that exist where schools in Oxfordshire were not adhering to the policy. This can cause distress to parents who are suffering financial hardship. The representatives from Abingdon’s Citizens Advice Bureau stated that they had experienced cases where distressed parents had visited their offices for advice as schools were charging unfairly for activities which they were not permitted to charge for.

If parents are charged by schools or feel pressured to contribute towards activities which they are exempt from paying then this may hinder their child’s overall personal development in both the long and short term as it may decrease their educational opportunities.

The financial pressures on parents who have children in state schools are clearly highlighted by the true average cost of attending primary school and secondary school. This was shown by the Child Poverty Action Group’s survey results where it was found that the average cost of sending a child to secondary school per year was £948.11 and to primary school was £563.15. Therefore, for any parent who is in financial hardship and relies on state funded benefits, an additional charge by a school for a trip or music tuition may lead to their child being unable to attend. This in turn means that the child would miss out on an educational opportunity to which they should otherwise be entitled to attend.

At present monitoring charging policy within schools in Oxfordshire is not considered to be a high priority in terms of education by the Children Young People & Families Directorate; this was commented upon by both Councillor Waine and John Mitchell. The relevant resources are not currently available to monitor the way in which charging policies are being issued and implemented by schools. However if the County Council is alerted to cases of individual schools not

implementing the charging policy set out by the Council it will intervene accordingly.

The Committee agreed the following recommendations to be put forward for consideration by the Cabinet. Brief background notes explaining the rationale for the recommendations is provided using evidence from the Select Committee style investigation and written evidence submitted by Mr Michael Hocken on behalf of the Abingdon Citizen's Advice Bureau:

(a) To re-issue a clear and unambiguous statement of law, practice and general policy on schools' charging on behalf of the authority as LEA;

Oxfordshire County Council is required by Government legislation to produce guidance about charging policy in schools to be distributed to all schools within the LEA. A separate Charging Policy is also produced by the Music Service at OCC. John Mitchell informed the Committee that these policies are updated on a regular basis and training is provided for school governors. The Scrutiny Committee felt that schools should be re-issued with the most up-to date guidance by the County Council in order to remind local schools of the law, practice and general policy in relation to schools' charging policy.

(b) To ensure by authorising a short letter of guidance to schools, that letters issued by schools to parents concerning plans and arrangements for school trips make it clear that the schools can only request voluntary contributions;

Oxfordshire County Council on 18 April 2005 supplied schools within the LEA with updated information on schools charging policy. This guidance included a model 'summary' for parents/guardians in relation to charging policy which schools could have issued at their own discretion (Annex 3). The model included information for parents in reference to when voluntary contributions may be requested by a school, such as transport to swimming sessions, transport on trips or for admission charges. The model suggests that schools use a statement similar to what is stated below;

*'We cannot charge for activities which are part of the normal school day or part of the National Curriculum but can ask for voluntary contributions'*

(Annex 3)

John Mitchell expanded on this, stating that it must be made clear by schools within the LEA that the absence of voluntary contributions by a parent or guardian will not mean that the child will be treated any differently to those whose parents do contribute financially.

Parents across the County were shown to support the opinion that children should not be denied an opportunity to attend a school trip because their parents were unable to provide voluntary contributions. The results of the Oxfordshire Citizen's Panel survey revealed that 7 out of 10 parents felt that children should not be at a disadvantage on the basis of their parents' financial situation.

A key theme that emerged from some of the witnesses interviewed by the Committee was that without Voluntary Contributions from parents, school trips, at the frequency at which they occur at present, would not be financially viable. Both

of the Deputy Head Teachers who attended the meeting commented that one or more trips may have been cancelled in the past at their respective schools due to a lack of voluntary contributions from parents. Dominic Ward commented that although Schools do budget for the cost of school trips to a certain extent, they do not budget for the entire cost of every trip as this would be an enormous drain upon school funds. Therefore, this indicated that some voluntary contributions are expected from some parents/guardians towards their child's extra-curricular activities.

A possible downfall of the request for voluntary contributions by schools was raised by Dominic Ward using the example of his own school. He stated that while parents in general are very supportive and give voluntary contributions, a minority have taken the line that they will no longer make voluntary contributions as this is not an absolute requirement for their child to attend a school trip. Therefore some families that are in a better financial position may decide not to contribute as they may feel that they are subsidising another family's child.

(c) To ensure that schools' charging and remissions policies and examples of trip notices are included in the materials required for submission to each School Improvement Partner (for roll-out before September 2006 in Oxfordshire secondary schools and September 2007 in the County's primary schools). [For reasons of resource efficiency, details of schools' charging policies should be systematically included in the inspection materials to be produced under the regular schools monitoring regime.];

The Committee felt that sharing examples of good practice amongst all schools was an essential tool in ensuring correct charging policies are used throughout schools within the Oxfordshire LEA. The ways in which trip notices are worded was seen to be particularly important when 'requesting' voluntary contributions as this was seen as a very sensitive area.

As stated previously, Oxfordshire County Council supplies schools with examples of model policies for trip notices and music tuition. Further work could be done however to disseminate examples of good practice from different schools across the County in order to assist in raising standards across Oxfordshire.

(d) To ask the Children, Young People & Families Directorate to prepare by September 2006 a detailed report on the sources and allocation of funding to alleviate social deprivation for consideration by the Children's Services Scrutiny Committee. This report should include a specific assessment on the dedication/earmarking of a proportion of such funds to increase access to participation in school trips (**particularly for schools in rural areas**) and, to this end, to henceforth include a specific line for school trips in the budget planning spreadsheet;

Oxfordshire County Council currently uses a fair funding formula entitled the 'Social Deprivation Factor' to provide additional funding to Schools within the LEA that are considered to have the most children from deprived backgrounds. This funding is currently divided up between 16 Oxfordshire schools; this consists of 12 primary and 4 secondary schools.



Due to relative priorities within the LEA, John Mitchell and Councillor Waine both stated that at present the Council could not dedicate any further resources to checking Charging policy within local schools. However both felt that a line within the actual budgets of schools themselves and in outturn figures would be a straightforward way in which the issue of charging policy in schools may be monitored more effectively.

(e) To ask all schools to ensure their prospectuses include a summary of their charging policy;

Oxfordshire County Council currently provides all schools within the LEA with a model summary for parents in relation to charging policy. This can be used at an individual schools own discretion, however they can also develop their own policy based around the structure provided and can choose to charge for even less activities/resources outside of the National Curriculum if they wish to do so.

The Committee asked that a summary of charging policy should be supplied within all school prospectuses as this would provide all parents/guardians with more accessible guidance to a schools charging policy. Currently parents can request details of any individual schools charging policy if this is required. It was suggested by some Members of the Committee that current good practice in an area such as this should be shared between schools across Oxfordshire.

(f) That the Council perform, in effect, a sponsoring role - acting as the contact between the local schools and businesses;

Currently individual schools seek to engage local businesses in an attempt to gain additional funds to subsidise their own pupils' activities. The success of such a practice varies from school to school. John Mitchell said that the majority of schools are 'very good' at accessing supplementary funds.

However the Committee felt that the County Council could act as a contact between local businesses and schools in an effort to maximise this extra funding stream. Local businesses may need to be 'sold' the idea of sponsoring a school or activity, for example the sponsorship could be seen as a good public relations exercise for a business within the local community. John Mitchell commented that possibly the best way to approach businesses in an area such as this would be to tap into their "hearts and minds in persuading them to invest in our collective futures".

(g) To engage the support of local MPs to promote the benefits of links between businesses and schools;

It was also suggested by a Member of the Committee that local MP's could be engaged to help publicise and promote the benefits of the links between businesses and schools. This would increase the publicity for the business(es) involved and would in all probability be viewed by the MP's as a good public relations exercise. If local MPs were engaged then they may also be able to use some of their influence within the community to raise awareness of the benefits of supporting local schools for businesses. Also, given their own personal links to

businesses within their constituencies, they may already know of some who may be willing to assist the cause.

(h) To request Officers to report back on the prospect of or possibility of reviewing the music tuition charging policy in the light of the costs for music tuition in primary schools.

Schools guidance from Oxfordshire County Council currently states that '*A charge may be made for instrumental music tuition for up to and including four pupils, unless the tuition forms part of the syllabus for a prescribed public examination*'. There are exceptions to this however. Fee remissions on music tuition and attendance on music courses is currently offered to children who qualify for free school meals (100% remission). Additionally some remissions are offered in other situations such as where a family has reduced financial circumstances and also when the parent/guardian of a pupil is a mature student and is in receipt of a grant for studying.

It was stated by a member of the Committee that, currently, children whose parents receive benefits can receive free music tuition outside of the provision set by the government in the National Curriculum. While this offers an opportunity for the children of people who receive certain benefits, it does not take into consideration the fact that some people who do not receive benefits may not be able to afford music tuition. In these cases the children may miss out on the extra, out of school tuition and other music related opportunities that may be made available by the schools.

Frank Newhofer commented that regrettably, his school did have to charge for music tuition; however he did not go into specific details of what was being charged for. He felt this had a negative effect on the pupils who were not given the opportunity to learn an instrument(s) as they would lose out on the educational value that music tuition provides.

#### **SECTION 4: CONCLUSIONS**

After consideration of all the evidence from the witnesses questioned, the Committee came to the overall conclusion that Oxfordshire County Council should be more proactive in relation to implementing the 'charging in schools' policy.

While the Oxfordshire LEA does not consider monitoring the implementation of charging policy in schools as a high priority, the Committee have recommended several ways in which the Council can positively influence how the policy is presented and also monitored without vastly increasing expenditure in this area. The key one is by inserting a line within the budget planning spreadsheet in relation to charging in schools. It was thought that this would increase each individual school's awareness of their responsibilities within this area without greatly increasing bureaucracy.

The Committee felt that accessibility to information in relation to 'charging policy' from the County Council to schools and from schools to parents should be improved. The main way in which this could be achieved is through setting out the charging policy within school prospectuses. The good practice of informing parents

at the start of the school year about all potential trips is one that should occur within all schools across the County.

The area of finance is a sensitive one and due care and attention must be paid to all documents from both the County Council and schools within Oxfordshire that request voluntary contributions. It must be made clear that voluntary contributions mean voluntary and there is no pressure to contribute if a parent's financial situation is such that they are unable to afford this. However it was made abundantly clear that without some contributions from parents, school trips as they exist now would not occur at the frequency that they currently do.

More could be done by both the County Council and schools to further enhance links with local businesses. This should be seen as businesses investing in their own futures by providing increased opportunities and funding to enhance the educational experiences of children at local schools. This may be done by encouraging schools to approach businesses themselves or by the County Council acting as a contact between the two parties to encourage partnership working.

The overall process of formulating the report was greatly assisted by the 'Select Committee' style of questioning of witnesses. The questions were focused and well thought out and in turn this led to a more efficient and productive questioning of those involved. The background papers supplied by Mr Hocken on behalf of the Abingdon Citizen's Advice Bureau were also considered to be of great assistance as this gave the Committee informed background knowledge about Charging Policy in Oxfordshire schools. This allowed the Children's Services Scrutiny Committee to provide well-informed recommendations to the Cabinet.

The recommendations will be under consideration from the Cabinet at their meeting on 18 July 2006.

## **ANNEX 1:- LIST OF WITNESSES**

Evidence was gathered from the following 'witnesses' during questioning:

**Simon Adams**- Senior Education Officer, Oxfordshire County Council

**Mr Michael Hocken**- Abingdon Citizen's Advice Bureau

**Graham Jones**- Oxfordshire Outdoor Learning Trust

**James Lawrence**- Consultation Officer, Oxfordshire County Council

**Katie Laine**- Citizen's Advice National Team

**John Mitchell**- Education Officer, Oxfordshire County Council

**Frank Newhofer**- Chairman of Oxford Community School Governing Body

**Vicky Paton**- (Acting Deputy Head teacher) Rose Hill Primary School, Oxford

**Ms Karen Thomas**- Abingdon Citizen's Advice Bureau

**Cllr Michael Waine**- Cabinet member for Schools Improvement

**Dominic Ward**- (Deputy Head teacher) Gosford Hill School, Kidlington

**Lesley Williams**- Oxfordshire Outdoor Learning Trust

**ANNEX 2: Children's Services Scrutiny Committee Members who attended the meeting**

**Councillors:**

Mrs Gail Bones  
Jean Fooks  
Deborah Glass Woodin  
Sue Haffenden  
Steve Hayward  
Bill Service  
Val Smith

Lawrie Stratford  
Keith Stone  
Melinda Tilley  
David Turner  
Nicolas P. Turner  
Carol Viney

**Co-opted Members:**

Mr Chris Bevan  
Mr Ben Jackson

Mrs Sue Matthew  
Ms Bernadine Spencer

## **ANNEX 3: Oxfordshire County Council Charging Policy Summary for Parents**

**This is a model which schools may wish to adapt to suit their purposes and may be folded into a convenient leaflet**

### **Charging policy Summary for parents**

**[School statement of principles here eg]**

At .....school we want to provide a range of experiences which add excitement and enjoyment to children's learning and personal development. All our pupils should have an equal opportunity to benefit from school visits, curricular and extra-curricular activities.

Many of these activities have a cost associated with them and, unfortunately, cannot be provided unless we ask parents for voluntary contributions and, in some cases, make a charge. But there are some strict

rules we have to abide by. Our charging policy, which has been agreed by governors, sets out what

we will charge for, how we will try to make it manageable for parents and how we will help parents with limited incomes.

The full, detailed, policy is available for inspection in the school office.

#### **Voluntary contributions**

We cannot charge for activities which are part of the normal school day or part of the National Curriculum but we can ask for **voluntary** contributions.

Examples of circumstances in which we might ask for voluntary contributions include:

- o Transport to swimming sessions
- o Transport on trips
- o Admission charges

*Why do we need to ask for voluntary contributions?*

We want to offer a wide range of activities to broaden your child's experience but we can't afford to do everything we would wish without help

from parents.

*What happens if I am unwilling to pay?*

Your contribution is voluntary.

Your child will not be excluded from the activity

**BUT if we do not receive enough voluntary contributions we may have to cancel the activity.**

*What happens if I am unable to pay?*

Parents in certain financial circumstances (overleaf) will not be expected to make voluntary contributions

Will my voluntary contribution pay for people who have not paid? No. The amount we ask in voluntary contribution must not exceed the actual cost of the activity per pupil.

#### **We promise that:**

We will tell you at the outset if the activity cannot be funded without voluntary contributions.

We shall give as much notice as possible of any activities which will require voluntary contributions.