# Guidance on Funding Offsite Activities

## Finance and Charging

### Terminology and charging

The laws relating to charging for offsite activities by educational establishments only applies to: schools, colleges and any other units that come within the education service.

1. **A charge is:**

Any sum payable by a parent for an optional extra to which they have previously agreed and or for board and lodging. It is recoverable as a civil debt.

1. **An optional extra is:**

An activity which takes place outside establishment hours;

* Parents can choose whether their children attend or not;
* Makes no profit from any charges made;
* Divides the costs equally among all pupil participants;
* Charges on some cannot be used to subsidise others;
* Cannot involve a charge for alternative provision for any pupils not attending;
* Is not a statutory curriculum requirement.
1. **A voluntary contribution:**

Is a sum of money that an establishment has asked parents to pay on a voluntary basis. Establishments can request voluntary contributions for anything. In so doing they must ensure that:

* The contribution is genuinely voluntary;
* Pupils are not treated differently because their parents choose not, or are unable, to pay.

### Possible types of funding

In this context there are three distinct categories of off-site activity:

* Activities which take place out of establishment time;
* Activities which take place during establishment time;
* Activities financed by voluntary contribution.

There are statutory criteria which determine whether an activity can be charged for or not.

The form of funding that is possible will depend on the category of an activity.

It is always possible for an establishment to subsidise an activity from the funds available to them, providing that the subsidy is in line with the school’s charging policy. It is also possible for activities to be funded by voluntary contributions provided the criteria are met.

### Deciding on types of funding

It is for the establishment to decide on the procedures they should adopt. The following factors should be considered during this process:

* Ensure that parents are fully aware of the nature and value of the activity and amount of funding required.
* Decide whether the activity will be classed as being in school time or out of school time.
* Decide what types of funding can and will be used;
* Ensure that parents are fully aware of the nature and value of the activity and the nature and amount of funding required.
* Ensure that the necessary level of funding is available before the school is financially committed.

### What can be charged for?

The number of circumstances in which a school can charge parents is limited.

There only two areas in which charges can be made regarding off-site activities. These are board and lodging and optional extras.

This is based on the Charging provisions of the Education Act 1988 and represents the statutory minimum requirement.

It is always possible to ask for voluntary contributions from parents.

[Charging for school activities (publishing.service.gov.uk)](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/706830/Charging_for_school_activities.pdf)

### What schools must pay from official funds

Where an activity is part of the syllabus of a prescribed examination or is required to fulfil statutory duties relating to the National Curriculum or to religious education, then the activity must be paid for out of official funds on the following basis:

* All transport and tuition costs (including teaching materials) must be covered by the school;
* a charge can be made for board and lodging;
* where a pupil’s parents receive Income Support or other statutory benefits such as free school meals then the school must also cover the cost of board and lodging.

Only two categories are at present recognised as forming part of the syllabus of a prescribed examination. These are field study courses that are necessary for any **‘A’ level and GCSE courses.**

### Voluntary contributions by parents

The advice of the Education Department is that voluntary contributions are the most effective, reasonable and easiest way of funding most off-site activities.

Schools relying on voluntary contributions from parents in order to fund an activity should make this clear at the outset in order to avoid disappointment should parents decide not to pay. In such cases schools may decide to use their own funds to cover the costs of those who cannot or who are not prepared to contribute.

**When considering voluntary contributions schools should advise parents that if insufficient voluntary contributions are received then the visit may have to be cancelled. Schools should also advise parents that in the event of cancellation due to insufficient funds being received any money paid to a tour company or to an activity provider up to the point of cancellation might be not recoverable.**

Schools might find it appropriate to seek voluntary contributions in advance to a particular school fund which could then be used to fund activities for other activities. This has the advantage of knowing the amount of funding available.

### Optional extras

Because of the way that the law dictates how activities in and out of school time must be, the number of activities that can be classed as optional extras will be relatively small.

Charges for an optional extra include:

* travel;
* board and lodging for pupils;
* materials, books, other equipment and entrance charges to facilities;
* non-teaching staff costs;
* school journey insurance;
* the cost of engaging supervisory staff for the activities and paying their travel, board and lodging and, where appropriate a fee.

### Optional extras and separate contracts for staff

Where the staff supervising an optional extra activity are also employed by the LA, and where there is an element of teachers’ expenses in the charge to parents, then they should be employed on a separate contract for services to provide the optional extra. They would be paid their salary in the normal way and the position with regard to liability insurance would remain the same.

The contractual statement need say no more than that the member of staff is employed on the same terms and conditions as apply to the individual’s principal contract of employment.

**Please note –** If a school uses voluntary contributions rather than a charge for funding an optional activity then the requirements listed above, would not apply.

### Outside agencies

The requirements on what parents can and can’t be charged for, do not apply if an outside agency is charging parents. This is of limited use to schools as a practical way forward. The school must have no connection with the outside agency, and it could not, therefore, initiate an off-site activity arranged in this way.

**Please Note:** Anyone attempting to contrive a situation which allowed a school to initiate an activity and subsequently charge parents through an outside agency would be at risk of breaking the law.