



# Charging & Remissions Policy

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<b>Source</b>	The Key and WSCC LA guidance
<b>Owner</b>	CFOO
<b>Approved by</b>	Finance, Audit & Risk Committee

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## Change Control:

Legislation & Guidance	Updated to reflect The Key and own articles and funding agreement
Definitions	New
Role of Staff	New
Role of Parent/Carer	New
Charges vs non charges	Broken out into what can be charged and what can't, rather than by day trip, residential
Example Template Letters	Four example template letters have been included.

## 1. Aims

The Trust and its schools aim to:

- Have robust, clear processes in place for charging and remissions
- Clearly set out the types of activity that can be charged for and when charges will and will not be made
- Offer a range of activities and visits whilst minimising the financial barriers that may prevent some pupils from taking full advantage of these opportunities

## 2. Legislation and guidance

This policy is based on advice from the Department for Education (DfE) on [charging for school activities](#) and the [Education Act 1996](#), sections 449 to 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.

## 3. Definitions

- **Charge:** a fee payable for specifically defined activities
- **Remission:** the cancellation of a charge which would normally be payable

## 4. Roles and responsibilities

### 4.1 The Trust Board

The Trust Board has overall responsibility for approving the charging and remissions policy, but can delegate this to a committee, an individual Trustee or the headteacher.

Responsibility for approving the charging and remissions policy has been delegated to the Finance, Audit & Risk Committee.

### 4.2 Headteachers

The headteacher is responsible for ensuring staff are familiar with the charging and remissions policy, and that it is being applied consistently.

### 4.3 Staff

Staff are responsible for:

- Implementing the charging and remissions policy consistently
- Notifying the headteacher of any specific circumstances that they are unsure about or where they are not certain if the policy applies

The school will provide staff with appropriate support in relation to this policy and its implementation.

### 4.4 Parents/carers

Parents/carers are expected to notify staff or the headteacher of any concerns or queries regarding the charging and remissions policy.

## **5. Where charges cannot be made**

Below we set out what we **cannot** charge for:

### **5.1 Education**

- Admission applications
- 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
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the school
  - Religious education
- Instrumental or vocal tuition, for pupils learning individually or in groups, unless the tuition is provided at the request of the pupil's parent/carer
- Entry for a prescribed public examination if the pupil has been prepared for it at the school
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school

### **5.2 Transport**

- Transporting registered pupils to or from the school premises, where the local authority (LA) has a statutory obligation to provide transport
- Transporting registered pupils to other premises where the governing board or LA has arranged for pupils to be educated
- Transport that enables a pupil to meet an examination requirement when they have been prepared for that examination at the school
- Transport provided in connection with an educational visit

### **5.3 Residential visits**

- Education provided on any visit that takes place during school hours
- Education provided on any visit that takes place outside school hours if it is part of:
  - The National Curriculum
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the school
  - Religious education
- Supply teachers, covering for teachers who are absent from school, accompanying pupils on a residential visit

It should be noted that if an external organisation arranges an activity to take place during school hours, and parents/carers give their consent to their child taking part, such an organisation may make a charge.

Voluntary contributions may be requested to enable the school to run extra activities which are deemed educationally desirable.

## 6. Where charges can be made

Below we set out what we **can** charge for:

### 6.1 Education

- Any materials, books, instruments or equipment, where the child's parent/carer wishes the child to own them
- Optional extras (see section 6.2)
- Music and vocal tuition, in limited circumstances (see section 6.3)
- Certain early years provision
- Community facilities
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school **and** the pupil fails, without good reason, to meet any examination requirement for a syllabus

### 6.2 Optional extras

We are able to charge for activities known as 'optional extras'. In these cases, schools can charge for providing materials, books, instruments or equipment. The following are optional extras:

- Education provided outside of school time that is not part of:
  - The National Curriculum
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the school
  - Religious education
- Examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school
- Transport (other than transport that is required to take the pupil to school or to other premises where the LA or governing board has arranged for the pupil to be provided with education)
- Board and lodging for a pupil on a residential visit
- Extended day services offered to pupils (such as breakfast clubs, after-school clubs, tea and supervised homework sessions)

When calculating the cost of optional extras, an amount may be included in relation to:

- Any materials, books, instruments or equipment provided in connection with the optional extra
- The cost of buildings and accommodation
- Non-teaching staff
- Teaching staff engaged under contracts for services purely to provide an optional extra (including supply teachers engaged specifically to provide the optional extra)
- The cost, or an appropriate proportion of the costs, for teaching staff employed to provide tuition in playing a musical instrument, or vocal tuition, where the tuition is an optional extra

Any charge made in respect of individual pupils will not be greater than the actual cost of providing the optional extra activity, divided equally by the number of pupils participating.

Any charge will not include an element of subsidy for any other pupils who wish to take part in the activity but whose parents/carers are unwilling or unable to pay the full charge.

In cases where a small proportion of the activity takes place during school hours, the charge cannot include the cost of alternative provision for those pupils who do not wish to participate.

Parental agreement is necessary for the provision of an optional extra that is to be charged for.

### 6.3 Music tuition

Schools can charge for vocal or instrumental tuition provided either individually or to groups of pupils, provided that the tuition is provided at the request of the pupil's parent/carer.

Charges may not exceed the cost of the provision, including the cost of the staff giving the tuition.

Charges cannot be made:

- If the teaching is an essential part of the National Curriculum
- If the teaching is provided under the first access to the Key Stage 2 instrumental and vocal tuition programme
- For a pupil who is looked after by a local authority

## **6.4 Residential visits**

We can charge for board and lodging on residential visits, but the charge must not exceed the actual cost. The amount requested will represent the actual cost, spread equally between the number of pupils participating. No profit will be made.

An initial deposit is usually requested for residential trips with the remaining balance payable in instalments. The initial deposit is non-refundable should a child subsequently not participate in the trip. A request for the refund of any further payment must be made in writing by the parent/carer to the Headteacher and will be considered at their discretion.

If the cancellation is due to illness, a medical certificate may be required.

## **7. Voluntary contributions**

As an exception to the requirements set out in section 5 of this policy, the school is able to ask for voluntary contributions from parents/carers to fund activities that would not otherwise be possible.

In general, no charge can be made for admitting pupils to maintained schools. Where education is provided wholly or mainly during school hours defined as those during which the school is in session, but excluding the midday break, it should be free. No compulsory charge will be made for any activity which takes place during school hours. Schools may always seek voluntary contributions in order to offer a wide range of experiences to pupils. It will be made clear in all correspondence that contributions are voluntary and that children of parents/carers who do or cannot contribute, will not be treated differently. If any parents/carers have financial difficulty (no pupil will be prevented from taking part), they will be invited to talk to the school to see if an agreement can be reached.

Some activities for which the school may ask parents/carers for voluntary contributions include:

### **Day Trips**

Optional trips wholly or mainly outside school hours will be charged at full cost.

Where the trip occurs during the school day, parents/carers will be asked for a voluntary contribution to cover the cost of their child's participation.

The amount requested will represent the actual cost of providing the trip, spread equally between the number of pupils participating. No profit will be made.

Once a trip has been paid for, there will be no reimbursements for absentees on the day, other than in exceptional circumstances at the Headteacher's discretion.

Where a child may be prevented from participating in an outing because of financial hardship, consideration should be given to reducing the voluntary contribution requested. Any shortfall will be met from the School Fund or Pupil Premium funding.

Children will be treated equally regardless of the amount of voluntary contribution made by their parent/carer. If insufficient funding is received, the School and/or Trust reserves the right to cancel the trip

### **Outside of school hours trips**

For all activities outside school hours, the charge will be set to cover the cost of items such as, but not limited to:

- Transport costs
- Board and lodging
- Entrance fees
- Insurance costs
- Materials required
- Incidental expenses
- Costs incurred as a result of staff supervising the activity
- Incremental building costs

The charge should not subsidise any other pupil participating. Any remission of charges for individual pupils should be met from the School budget.

If additional costs have been incurred in respect of the trip for the child who is no longer able to attend the trip, this element will not be refunded.

Children will be treated equally regardless of the payment made by their parent/carer.

**There is no obligation for parents/carers to make any contribution, and no child will be excluded from an activity if their parents/carers are unwilling or unable to pay.**

If insufficient funding is received, the School and/or Trust reserves the right to cancel the trip.

## **8. Activities we charge for**

The school will charge for the following activities:

### **Extended Care Provision**

The Breakfast and After School care (and any holiday clubs) are not educational activities and therefore are chargeable separately.

### **Optional Extras (Clubs)**

Charges may be made for some activities that are known as 'optional extras'. The school aims to provide a variety of clubs and the school reserves the right to charge for clubs outside of normal school hours that are not part of the national curriculum. Participation in any optional extra activity will be on the basis of parental choice and a willingness to meet the charges, prior to attendance at the activity. Parental agreement must be established prior to a child attending such an activity. There will be no reimbursement for absentees.

Children who qualify for Pupil Premium will be entitled to one free club each term on the basis of availability of spaces.

### **School Meals**

Children in Reception, Year 1 and Year 2 receive a free school lunch funded by the Universal Infant Free School Meal programme.

Charges are made for school meals from Year 3 onwards, unless a pupil is entitled to free school meals).

### **Uniform**

A variety of items are available for sale via the official uniform suppliers. Some items of uniform are compulsory, and these are detailed in the School Uniform Policy.

### **Photographs**

Individual and class photographs taken by the school's appointed photographer are offered for sale from time to time.

### **Music Tuition**

Music tuition is the only exception to the rule that all education provided during school hours must be free. The Charges for Music Tuition (England) Regulations 2007 allow for charges to be made for vocal or instrumental tuition provided either individually or to groups of any size – provided that the tuition is at the request of the pupil's parents. The charges will not exceed the cost of the provision, including the cost of the staff providing the tuition. Charges are raised by the peripatetic music teachers and should be settled directly.

### **Loss of or damage to Trust/School property**

Loss of, damage to or breakage of Trust/School property e.g. books, windows, furniture, equipment etc. will be charged for if caused by carelessness, negligence or deliberate act. The charge will be the cost of replacement or repair, or such

lower cost at the Headteacher may decide. Similarly, a charge will be levied in respect of wilful damage, neglect or loss of property belonging to a third party, where the cost has been recharged to the Trust/School.

#### **Other**

The Trust/School may levy a charge for miscellaneous services up to the cost of providing such services e.g., for providing supporting evidence regarding visa applications, passports and additional reports for independent school applications etc.

It will be made clear in all communications where contributions are voluntary, and that no pupil will be treated differently according to whether or not their parent/carer has contributed.

If insufficient funds are collected to cover costs, the school and/or Trust reserves the right to cancel the trip and/or activity.

## **9. Remissions**

In some circumstances, the school may not charge for items or activities set out in sections 6 and 8 of this policy. This will be at the discretion of the Trust and will depend on the activity in question. Any charge may be remitted in whole or in part in response to a request by the parent/carer in writing to the Headteacher in confidence.

### **9.1 Remissions for residential visits**

Parents/carers who can prove they are in receipt of any of the following benefits will be exempt from paying the cost of board and lodging for residential visits:

- Income Support
- Income-based Jobseeker's Allowance
- Income-related Employment and Support Allowance
- Support under part VI of the Immigration and Asylum Act 1999
- The guaranteed element of Pension Credit
- Child Tax Credit – provided you're not also entitled to Working Tax Credit and have an annual gross income of no more than £16,190
- Working Tax Credit run-on – paid for 4 weeks after you stop qualifying for Working Tax Credit
- Universal Credit – if you apply on or after 1 April 2018, your household income must be less than £7,400 a year (after tax and not including any benefits you get)

## **10. Monitoring arrangements**

The Headteacher monitors charges and remissions, and ensures these comply with this policy. This policy will be reviewed by the CFOO annually. At every review, the policy will be approved by the Finance, Audit & Risk Committee.

## **11. Example Template Letters**

The following appendix provides four example letters that can be used.

Dear Parent,

During each school year pupils, as part of the curriculum, may make certain articles out of materials provided by the school. There are also occasions when specific books, equipment or instruments might be acquired for pupils.

At times, parents might wish to own such items, and it is possible for these to be purchased from the school at a price equivalent to the cost incurred by the school.

If you are interested in buying any items, please either detach or return the slip below indicating your wish to make a purchase or write to me at any time during the year. You will be told the cost of any item in a note which your son/daughter will bring home. Payment would become due immediately. Naturally, if you do not wish to own any particular article, your child will not be disadvantaged in any way as the school has a duty to provide all materials and equipment to ensure an effective delivery of the National Curriculum.

If any parent is interested in owning materials or equipment, but feels unable to meet the cost at present, please do not hesitate to make an appointment with me to discuss how a resolution might be achieved.

Yours sincerely,

Headteacher

## EXAMPLE LETTER 2

Dear Parent,

Example: Visit to Theatre

It is intended to arrange a visit to xxxxxxxxxxxxxxxxx on xxxxxxxx(date). For a performance of xxxxxx commencing at 5.00 p.m. The journey will be by coach, leaving the school at 2.30 p.m. Return to school is expected to be about 10.30 p.m.

As the major part of the journey is outside of school hours and the activity is not directly related to the children's curriculum or an examination for which they are being entered, there will be a charge for the visit amounting to £xx per head. This includes the cost of the coach and of the theatre ticket.

Participation in the visit is voluntary. Those pupils choosing not to take part will follow a normal timetable until the end of the school day at 3.30 p.m when transport home will be as normal.

If any pupil/student wishes to take part in the trip, but current circumstances make it difficult to meet the charge, please do not hesitate to contact me in confidence to discuss whether it is possible to reach some mutual arrangement.

Yours sincerely,

Headteacher

EXAMPLE LETTER 3

Dear Parent

Residential Visit

We are proposing to arrange a residential trip to xxxxxxxx next year/summer/autumn for Class/Year X pupils. The dates planned are xx xxxx to xx xxxx 20xx inclusive, and the children/students will stay at xxxxxxxxxxxx (*name of hotel/establishment*). The purpose of the trip is to enhance the curriculum for the children/students and they will benefit (*give brief details of educational opportunities and benefits*).

The total cost per pupil for the trip will be £xxx, which includes an element for board and lodging, which is chargeable to parents.

The cost of board and lodging will be £xx per child/student, which includes breakfast, packed lunch and dinner. Payment of a £xx deposit is required by (*date*), with the balance being paid by (*final date*) either in a lump sum or by installments as agreed with the leader of the trip.

If a family is in receipt of specific benefits, the school is obliged by law to waive the charges. A list of the benefits applicable are set out in the School Prospectus and in the school's charging policy, which are available from the school office. If you wish to speak to me in confidence about the entitlement to waive charges, please do not hesitate to contact me to arrange an appointment.

All other costs, including transport, will be £xx, and parents are being asked to make a voluntary contribution of all or part of this amount. Parents are not obliged to make a contribution, but it is probable that, if insufficient monies are received, the trip will have to be cancelled. If there are exceptional cases of hardship, the school will try to support costs through its own budget, but this would reduce what we are able to spend in terms of materials and equipment for the children.

Further details of the trip will be sent at a later date.

Yours sincerely,

Headteacher

#### EXAMPLE LETTER 4

Dear Parent

Visit to xxxxxxxxxxxxxxxxxxxxxxxxx

It is intended to arrange a visit for Classxxx/Yxx pupils to xxxxxxxxx on *(date)*. The journey will be by coach, leaving school at x.xx am. Arrival back at school will be at about x.xx p.m. and, if you wish your child to participate, you would need to meet your child, or make arrangements for his/her collection, at that time.

You are invited to make a voluntary contribution of £x to cover the cost of the transport and other incidental expenses, but you would need to provide a packed lunch. Although the contribution is voluntary, I do need to point out that it is probable that the visit could not take place unless all parents, who are able, are willing to contribute.

I appreciate that some families might find it particularly difficult to contribute all or part of the suggested sum, and if you feel that you are in such a position, please do not hesitate to contact me in confidence to discuss whether some suitable arrangements can be made to cover the cost of your child's participation.

I also need to stress that if a family were unable to contribute, and the trip were still to proceed, no child within the class/year group for whom the trip is intended will be disadvantaged and be left out of the activity.

Yours sincerely,

Headteacher