



Charging and Remissions Policy

Policy Group	C	Finance / Audit
Title	C1	Charging and Remissions
Trust sub-committee		Resources
Last reviewed		December 2024
Next scheduled review		December 2025
Co-ordinated by		Chief People and Finance Officer



1 Principles

- 1.1 In line with our values of equity and aspiration, our Trust wants all of our children and young people to be able to access and participate in school activities, both on and off site, within and outside the curriculum, regardless of their family's financial means.
- 1.2 This charging and remissions policy describes how we will do our best to ensure all children and young people within our care are able to benefit from visits and activities whilst seeking to minimise the financial barriers which may prevent some benefitting from such 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. This policy complied with our Trust's funding agreement and our Articles of Association.

3 Trust Arrangements

- 3.1 This policy has been developed at Trust level and each school may have supplementary details not covered within this policy. Where this is the case, the guidance will always be additional and not contradictory.
- 3.2 This policy does not apply to charges made and determined by other organisations offering activities and services on the school premises.
- 3.3 Throughout this policy a charge relates to a fee that is payable and a remission is a cancellation or absence of a charge/fee.

4 Roles and responsibilities

- 4.1 The Trust Board has ultimate responsibility for approving and monitoring the implementation of this policy but may choose to delegate to a committee.
- 4.2 All staff are required to ensure they implement this policy consistently and advise their schools headteacher, in the first instance, or Trust CPFO, if they have any issues in executing this policy.
- 4.3 We encourage all who use this policy to raise any concerns or flag any issues in respect of this policy, either with the school or Trust team.

5 Charging Policy

- 5.1 Below we set out our approach to charging across the Trust but in all instances we would encourage parents and carers to approach their school if they are having financial difficulties. A number of schools offer financial support and on a case by case basis all schools will seek to accommodate the needs of families in order to enable as many children and young people to access these opportunities.
- 5.2 In all instances, where a charge is applicable, it will only cover costs incurred and not include a profit - this can include reasonable administration charges such as bank charges. The charge will always be derived by taking the total cost of the activity or trip and dividing by the total number of students accessing the activity or trip.
- 5.3 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. As such it

may be that where insufficient contributions are made the activity or trip is unviable, at which point it may be cancelled and refunds made where applicable.

5.4 Parental agreement will be sought in advance of any costs being incurred.

5.5 **Public examinations**

5.5.1 No charge will be made for entry for a prescribed public exam, where the child has been prepared for it by the school

5.5.2 We may charge:

5.5.2.1 for non-prescribed public exams and for public exams where children are not prepared by the school.

5.5.2.2 parents the examination fee if a child fails, without good reason, to complete the requirements of a public examination where the school originally paid the entry fee.

5.5.2.3 parents the examination fee if a child /parent wishes the child to re-sit the examination where the school originally paid the entry fee. Often this fee is reimbursed by the exam board if the outcome is successful and the school will of course pass this back.

5.6 **Activities for children that take place during school hours (excluding breaks)**

5.6.1 No charge will be made for activities provided during school hours with the exception of music tuition where this has been requested by the parent/guardian.

5.6.2 No charge will be made for transport during school hours.

5.6.3 Free school meals are provided by the Local Authority and families should apply directly. Funding is allocated for free school meals in October so any families who submit late applications, whilst these may be successful the school may not be able to back-date the allowance. As a rule, we will refund for half a term when requests are made to do so.

5.6.4 We may charge:

5.6.4.1 to cover the cost of ingredients or materials where parents/carers have confirmed in advance that they wish to own the finished product.

5.6.4.2 deposits or small administration fees for items such as lockers (where available) or large textbooks

5.6.4.3 a voluntary contribution to activities

5.7 **Activities for children that take place outside school hours (non-residential)**

5.7.1 No charge will be made for an activity that takes place outside school hours when it is a necessary part of the curriculum or part of a syllabus for a prescribed public examination that the child is being prepared for at the school or part of the school's basic curriculum for religious education.

5.7.2 We may charge:

5.7.2.1 for trips which take place mainly out of school hours and are not part of the curriculum/syllabus.

5.7.2.2 for wrap around care

5.8 **Activities that take place partly during school hours either on or off site (non-residential)**

5.8.1 Where the majority of time spent on a non-residential activity is within school hours, we must treat the activity as if it is fully within school hours, and charges will not apply but voluntary contributions may be sought.

5.8.2 If the majority of the time spent on a non-residential activity is outside school hours, we must treat the activity as if it happens fully outside school hours and charges will be applicable.

5.9 **Residentials**

5.9.1 Residentials are classified as being within school hours if the number of school sessions missed by the children is at least 50% of the number of half days spent on the trip.

5.9.2 **Board and lodging**

We will charge an amount up to the full cost of board and lodging on residentials whether it is classified as taking place within or outside school hours, except where children are legally entitled to remission. In such cases no charge will be made for board and lodging.

5.9.3 **Travel**

No charge will be made for travel costs (legal requirement), although a voluntary contribution may be sought. Where the residential is classified as being outside school hours, a charge will be made for travel.

5.9.4 **Activities on residential**

If the residential trip is classified as being within school hours no charge can legally be made for the educational activities provided although a voluntary contribution may be sought. If the residential is classified as being outside school hours, a charge will be made for the educational activities provided

5.10 **Music tuition within school hours**

5.10.1 No charge will be made if the music tuition is an essential part of the child's curriculum or a public examination syllabus being followed by the child.

5.10.2 We may charge for all other instrumental and vocal tuition requested by parents/carers and delivered by specialist tutors within school hours, whether offered to an individual or group of children. Charges may vary depending on size of group, length of lesson and type of instrument.

5.10.3 Where we make a charge for instrumental and vocal tuition within school hours we will remit charges for children on free school meals in order to ensure specialist music tuition is accessible and affordable for all children.

5.11 **Damage to property and breakages**

5.11.1 We may seek to recover some or all of the costs incurred due to wilful damage or breakage of school property.

5.11.2 We may seek to recover some or all of the costs incurred due to wilful damage or breakage of property belonging to a third party where the school has been charged.

5.12 **Remissions and concessions**

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

5.12.1.1 Income Support

5.12.1.2 Income-based Jobseeker's Allowance

5.12.1.3 Income-related Employment and Support Allowance

5.12.1.4 Support under part VI of the Immigration and Asylum Act 1999

5.12.1.5 The guaranteed element of Pension Credit

5.12.1.6 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

5.12.1.7 Working Tax Credit run-on – paid for 4 weeks after you stop qualifying for Working Tax Credit

5.12.1.8 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)

- 5.13 In addition to residential exemptions we may choose to subsidise, in full or part, charges for certain activities where these charges can legally be made.

6 Additional Considerations

Our Trust recognises its responsibility to ensure that the offer of activities and educational visits does not place an unnecessary burden on family finances. To this end schools will try to adhere to the following guidelines:

- 6.1 Where possible schools will publish a list of their visits and approximate cost at the beginning of the school year so that parents/carers can plan ahead.
- 6.2 Have a system for parent/carers to pay in instalments and to secure their place on a trip by payment of a small deposit.
- 6.3 When the opportunity of a trip arises at short notice it will be possible to arrange to pay in instalments.
- 6.4 Where possible schools will avoid the 'first pay, first served' basis when offering opportunities as this can discriminate against children from families of lower incomes

7 Refunds

- 7.1 Where an activity/trip makes a surplus then parents/carers will be offered a refund when the sum involved per child might reasonably be expected to be refunded, as a guideline any surplus over 10% or £10 (whichever is greater) would be expected to be offered as a refund. At such time, the option to permit any excess payments to go into school hardship funds to support access to opportunities of all our pupils will also be presented.
- 7.2 If an activity is cancelled, then a refund will be offered as soon as possible.
- 7.3 If a child is withdrawn by parents or guardian or disbarred by the school in accessing an activity as a result of a Behaviour policy breach, and in the event their place cannot be filled or cancelled no refund will be made and any outstanding amounts will be payable. There are some exceptions where school insurance may cover this (such as for serious illness).

8 Debts

- 8.1 When a parent/carer's debts with the school are high and unresolved the school reserves the right to apply any income received from the family to its outstanding debts before providing chargeable goods/services.
- 8.2 Furthermore in respect of extra provision, and that not required to be provided legally, we may withdraw provision (such as for nursery sessions outside of the government funding).

