

INCLUSIVE | MULTI ACADEMY TRUST

CHARGING AND REMISSIONS POLICY

DOCUMENT DETAIL	
Approving Body	Resources Committee
Author	Sharon Carlyon (based on National College model policy)
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Next review	June 2027

Statement of intent

The Trust is committed to ensuring equal opportunities for all pupils, regardless of financial circumstances, and has created this policy to ensure we adhere to legal requirements regarding charging for school activities and meet all statutory guidance provided by the DfE.

The Trust will ensure that this policy is published on their websites and provides each school community with details of activities for which a school will charge parents, and the circumstances in which they will waive any charge parents would otherwise expect to pay.

Legal Framework

This policy will have consideration for, and be in compliance with, the following legislation and statutory guidance including, but not limited to, the following:

- Academies Act 2010
- Education Act 1996
- Children Act 1989
- The Charges for Music Tuition (England) Regulations 2007
- The Education (Prescribed Public Examinations) (England) Regulations 2010
- Freedom of Information Act 2000
- DfE 'Charging for School Activities'
- DfE 'Academy trust governance guide'
- DfE 'What academies and further education colleges must or should publish online'
- The Trust Funding Agreement
- DfE Academy Trust Handbook 2025

This policy operates in conjunction with the following Trust policies:

- Complaints Policy
- Bad Debt Policy
- Freedom of Information Policy
- Governance Framework
- Data Protection Policy

Definitions

For the purposes of this policy the following definitions will be used:

Charge: a fee payable for specifically defined activities.

Remission: the cancellation of a charge, partly or wholly, which would normally be payable.

Roles and responsibilities

The Trust Board will be responsible for:

- The management of the school's delegated finances
- Ensuring the school acts in accordance with this policy at all times.
- Ensuring money is spent for the educational benefit of pupils attending the school, and for the benefit of pupils in other schools.
- Recognising its legal requirements regarding charging for school activities under the Education Act 1996 and meeting all additional guidance provided by the DfE.

The headteacher will be responsible for:

- Ensuring this policy is effectively implemented.
- Prioritising and allocating financial resources appropriately, ensuring efficiency, effectiveness and probity in the use of public funds.
- Informing parents on low incomes and in receipt of specific benefits of the support available to them when being asked for contributions towards the cost of school visits.
- Liaising with parents and staff regarding any charges being applied and making decisions regarding appropriate remissions on a case-by-case basis.

The School Business Officer will:

- Process and record payments for activities, taking into account any remissions applied.
- Ensure that the correct invoices are sent to parents, and that payment is received.

Charging for Education

We will not charge parents for:

- 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, part of a syllabus for a prescribed public examination that the pupil is being prepared for by the school, or part of religious education.
- Instrumental or vocal tuition, unless provided at the request of the pupil's parents.

We may charge parents for the following:

- Materials, books, instruments or equipment, where they desire their child to own them
- Optional extras
- Music and vocational tuition (in certain circumstances)
- Early years provision. Parents can expect to pay for any meals offered by the provider alongside their free entitlement. Parents can also expect to pay for other consumables or additional activities offered by the provider, such as nappies or trips.
- Use of community facilities
- Provision of information within the scope of freedom of information. Please refer to the Freedom of Information Policy for further detail of charges.

Optional Extras

We may charge parents for the following optional extras:

- Education provided outside of school time that is not:
 1. Part of the national curriculum.
 2. Part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school.
 3. Religious education.
- Transport, other than that arranged by the LA for the pupil to be provided with education
- Board and lodging for a pupil on a residential visit
- Extended day services offered to pupils eg breakfast club or out of school provision

When calculating the cost of optional extras, Trust schools will only take into account the following:

- Materials, books, instruments or equipment provided in relation to the optional extra
- The cost of buildings and accommodation
- The employment of non-teaching staff

- The cost of teaching staff (including teaching assistants) under contracts for services purely to provide an optional extra
- The cost, or an appropriate proportion of the costs, for teaching staff employed to provide vocal tuition or tuition in playing a musical instrument, where the tuition is an optional extra.

Trust schools will not charge in excess of the actual cost of providing the optional extra divided by the number of participating pupils. We will not charge a subsidy for any pupils wishing to participate but whose parents are unwilling or unable to pay the full charge. If a proportion of the activity takes place during school hours, we will not charge for the cost of alternative provision for those not participating.

The school will not charge for supply teachers to cover for teachers who are absent from school accompanying pupils on a residential visit.

Participation in any optional activity will be on the basis of parental choice and a willingness to meet the charges. Therefore, parental agreement is a pre-requisite for the provision of an optional extra.

Voluntary Contributions

We may, from time-to-time, ask for voluntary contributions towards the benefit of the school or school activities. If an activity cannot be funded without voluntary contributions, we will make this clear to parents at the outset. We will also make it clear that there is no obligation for parents to make a contribution, and notify parents whether assistance is available.

No child will be excluded from an activity simply because their parents are unwilling or unable to pay. If a parent is unwilling or unable to pay, their child will still be given an equal opportunity to take part in the activity. If insufficient voluntary contributions are raised to fund an activity, and the school cannot fund it via another source, the activity will be cancelled and this will be made clear to parents.

We will strive to ensure that parents do not feel pressurised into making voluntary contributions. Measures which may make parents feel pressured, such as colour coded letters and direct debit or standing order mandates, will not be sent when the school requests contributions

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.

Charging will not be made if the teaching is an essential part of the national curriculum.

No charge will be made in respect of a pupils who is a Looked After Child

Transport

We will not charge for:

- Transporting registered pupils to or from the school premises, where the LA has a statutory obligation to provide the transport.
- Transporting registered pupils to other premises where the governing body or LA has arranged for pupils to be educated.
- Transport provided for an educational visit.

Residential Visits

We will not charge for:

- 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, part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education.
- Supply teachers to cover for teachers accompanying pupils on visits.

We may charge for board and lodging – but the charge will not exceed the actual cost.

Parents will be exempt from board and lodging costs if they can prove that they are in receipt of one or more of the following benefits:

- 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 that they are 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 four weeks after they stop qualifying for Working Tax Credit
- Universal Credit – if they apply on or after 1 April 2018, their household income must be less than £7,400 a year (after tax and not including any benefits they receive)

The school will provide a form for parents to submit and provide proof of receipt of one of the above benefit payments in order to be eligible for the exemption.

Education partly during School Hours

If 50 percent or more of the time spent on an activity occurs during school hours (including time spent travelling if the travel occurs during school hours), it is deemed to take place during school hours and no charge will be made.

Whatever the start and finish times of the school day, regulations require that the school day is divided into two sessions. School hours do not include the break in the middle of the day.

If less than 50 percent of the time spent on an activity occurs during school hours, it is deemed to have taken place outside school hours and we may charge for the activity; however, we will not charge if the activity is part of the national curriculum, part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education.

Residential visits: If the number of school sessions covered by the visit is equal to or greater than 50 percent of the number of half days (any period of 12 hours ending with noon or midnight on any day) spent on the visit, we will not charge for the activity.

The remission of charges for board and lodging payments is the responsibility of the school. These costs will be borne by our contingency funds.

Any charges for extended day services will be optional.

Damaged or Lost Items

The school may charge for the cost of replacing items that are damaged or lost due to the negligence or poor behaviour of pupils or their parents. Parents will only be charged the replacement cost to purchase the same or equivalent item. The school will consider waiving costs in exceptional circumstances, e.g. financial hardship.

Remissions

We have set aside a small fund to enable families in financial difficulty to send their children on visits/activities. The funding is limited and there is no guarantee that all requests can be met. Assistance will be allocated on a need's basis, and if the full cost of the trip/activity cannot be met through assistance funding and voluntary contributions, the trip/activity will be cancelled.

Parents in receipt of any of the following benefits may request assistance with the costs of activities:

- Income Support
- Income Based Jobseekers Allowance
- Support under part VI of the Immigration and Asylum Act 1999
- Child Tax Credit, provided that Working Tax Credit is not also received and the family's income (as assessed by Her Majesty's Revenue and Customs) did not exceed £16,190 in the previous financial year
- The guarantee element of State Pension Credit
- An income related employment and support allowance
- Working Tax Credit run on – paid for four weeks after they stop qualifying for Working Tax Credit.
- Universal Credit – if they apply on or after 1 April 2018, their household income must be less than £7,400 a year (after tax and not including any benefits they receive)

School Trip Refunds

Initial deposits for school trips will be non-refundable. Parents will be informed of this when they are provided with initial information about the trip.

In the event that the school has to cancel a trip due to foreseen circumstances, parental contributions will be refunded. In the event that a school trip is cancelled by a party other than the school due to unforeseen circumstances, it is at the school's discretion as to whether a refund is given to parents.

In the event that a pupil or their parents cancel the pupil's place on a trip, it will be at the school's discretion as to whether a refund is given. The school will take into account the reason for cancellation, whether the school will be reimbursed for the pupil's place on the trip, and whether the place on the trip can be offered to another pupil.

Where a pupil or their parents have previously cancelled a place on a trip and received a full refund, the school will have the right to refuse to allow the pupil to attend future trips and visits.

In the event that a pupil cannot attend a trip at the last minute, e.g. due to illness, it will be at the school's discretion as to whether a refund is given. The school will take into account whether the school will be reimbursed for the pupil's place on the trip and whether the place on the trip can be offered to another pupil.

In the event that a school trip is postponed due to unforeseen circumstances, it will be at the school's

discretion as to what happens with the parental contributions for the trip. The school will consider its options, which could include carrying forward the money until the trip takes place, transferring the money to another trip, or refunding parents.

In the event that the decision is made to postpone a trip due to foreseen circumstances, it will be at the school's discretion as to what happens with the parental contributions for the trip. The school will consider its options, which could include carrying forward the money until the trip takes place, transferring the money to another trip, or refunding parents.

Once trip arrangements have been booked and confirmed, if contributions exceed the total cost of the trip, a refund will be given where the excess is greater than £2 per pupil.

The school will deal with cancellations and refunds on a case-by-case basis, ensuring that all pupils and their families are treated equally.

If a parent wishes to make a complaint about refunds, they will be able to do so via the Complaints Procedures Policy.

Freedom of Information Policy and Publication Scheme

The school's Freedom of Information Policy and Freedom of Information Publication Scheme will set out where fees may be charged for the provision of information.

Monitoring and Review

This policy will be reviewed at least annually by the Resources Committee.