

Policy Statements and Procedures

CHARGING AND REMISSIONS POLICY

INTRODUCTION

The purpose of this policy is to assist Headteachers and Principals of Schools and Colleges within the Academy Trust to work together with their respective Local Advisory (Governing) Body (LAB) and ensure that all learners have full and free access to an educational experience which is rich, varied and engaging.

The legislation which underpins this policy is quite clear in regard to charging for school activities in state maintained schools throughout England, being set out in Sections 449-462 of the Education Act 1996. It also lays down clear principles for Academies and Free Schools, providing guidance to complement the information given in 'A Guide to the Law for School Governors' and 'Charging for school activities' May 2018 Departmental advice for governing bodies, school leaders, school staff and local authorities. It is however important to read this policy in conjunction with other documentation provided by

the Trust including the Admissions Policy for each School and College, the Equity Policy for the Trust, together with a range of documents which reference curriculum provision and assessment.

To this end, the Academy Trust will ensure there is no charge for:

- Processing an application regarding a child's admission to one of its Schools or Colleges.
- Education provided during school hours, including the supply of any materials, books, equipment, instruments or other equipment.
- Education provided outside school hours if it is part of the National Curriculum, or part of a syllabus for a prescribed public examination that the learner is being prepared for at the School or College, or part of the religious education programme.
- Tuition for learning to play a musical instrument if the tuition is required as part of the National Curriculum, or part of a syllabus for a prescribed public examination that the learner is being prepared for at the School or College or part of religious education programme.
- Entry for a prescribed public examination, if the learner has been prepared at the School or College.
- Examination re-sit(s) if the learner is being prepared for the re-sit(s) at the School or College, save where the learner without good reason, fails to sit a compulsory paper, module or unit and/or meet any other requirement of the syllabus. In this instance, the fee can be recovered from the learner's parents, guardians or carers, guardians or carers.

Within the federated structure of the Trust and under the charging provision set out in legislation, each LAB has responsibility for overseeing the educational provision offered at its respective School or College. As such, it may choose to charge for a certain number of defined activities. These charges can only be made in circumstances where the policy permits, paying due regard to arrangements which entitle some families exemption. In calculating the cost of optional activities, the LAB may include the costs incurred in relation to:

- Any materials, books, instruments, or equipment provided in connection with the optional extra.
- Non-teaching staff.

- Teaching staff engaged under contracts for services purely to provide an optional extra, this includes supply teachers engaged specifically to provide the optional extra.
- The cost or a proportion of the costs, for teaching staff employed to provide tuition in playing a musical instrument, where the tuition is an optional extra.

Any charge made in respect of individual learners will not exceed the actual cost of providing the optional activity. In other words, the total cost will be divided equally by the number of learners participating. No incidental surpluses or elements of subsidy will be included to underwrite the costs of other learners whose parents, guardians or carers are unwilling or unable to meet the full cost.

Furthermore, in cases where a small proportion of the activity takes place during school hours, the charge will not include the cost of alternative provision for those learners who do not wish to participate. Accordingly, the cost of supply staff to cover for those teachers who are absent by accompanying learners on a residential visit, will not be charged.

The LAB will only offer optional activities on the basis of parental choice. Therefore, the agreement of parents, guardians or carers, will be a necessary pre-requisite in circumstances where charges are to be made.

VOLUNTARY CONTRIBUTIONS

Nothing in legislation prevents any LAB from asking for voluntary contributions for the benefit of the respective School or College in terms of activities. However, if the activity cannot be funded without voluntary contributions, the Headteacher or Principal of the School or College will make this clear to parents, guardians or carers at the outset. If insufficient voluntary contributions are forthcoming to fund the activity, then it will simply be cancelled. All of this will be made clear to parents, guardians or carers in correspondence, together with details of the approach to be used by the Headteacher or Principal in allocating places for the activity. To this end the LAB will:

- Offer a range of activities that are purely optional, therefore being matter of parental choice.
- Request financial contributions to fund specific activities or part of an on-going 'school fund' to benefit learners generally.
- Make it clear in all correspondence that any such contribution is voluntary and not compulsory.
- Take steps to ensure that parents, guardians or carers, do not feel pressurised in paying such contributions as a result of follow up telephone calls or reminder letters.
- Exclude the practice of seeking direct debits or standing order mandates requesting such contributions.

RESIDENTIAL VISITS

The Trust will apply the aforementioned principles when offering residential visits, in that it will not charge for:

- Education provided on any visit that takes place during school or college hours.
- Education provided on any visit that takes place outside school or college hours if it is part of the National Curriculum, or part of a syllabus for a prescribed public examination that the learner is being prepared for by the Trust, or part of a religious education programme.
- Supply teachers to cover for those teachers who are absent from school or college accompanying learners on a residential visit.

The LAB however will charge for board and lodging associated with such residential visits so long as the charge does not exceed the actual cost incurred by the School or College.

When informing parents, guardians or carers about a forthcoming visit, the Headteacher or Principal will make it clear that for those who can prove they are in receipt of the following benefits, no costs will be levied in respect of board and lodging. Specifically, these benefits include:

- Income Support (IS).
- Income Based Jobseekers Allowance (IBJSA).
- 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, does not exceed the published threshold for the relevant financial year).
- The guarantee element of State Pension Credit.
- An income related employment and support allowance.

Since April 2003, the eligibility criteria which entitle families to an exemption from meeting the cost of board and lodging on residential trips has been aligned with Free School Meals (FSM) eligibility criteria. Furthermore, the Government has recently introduced the Pupil Premium which recognises the needs of disadvantaged children above the basic funding provided across the country. The amount which each school or college receives reflects the number of learners on roll who are deemed to live in deprived circumstances. Therefore, each LAB will use this funding to support those children eligible for the Pupil Premium, ensuring that every child has an equal opportunity in terms of life experience.

This underpinning ethos is reflected elsewhere within the policies of the Trust meaning that no Headteacher or Principal will allow a child to be excluded from taking part in an activity that is not part of the planned curriculum, purely on grounds that the parent, guardian or carer cannot make or refuses to make, a contribution. If there is a residential activity largely taking place in school time or which meets the requirements of the syllabus of a public examination or is to do with the National Curriculum or part of a religious education programme, no charge will be made including the cost of any travel.

TRANSPORT

In compliance with Section 19 of the Transport Act 1985, no charge will be levied for transport as the Academy Trust has not applied to the Local Authority (LA) for a permit to recover costs incurred, including depreciation, in respect of transport. In consequence, the Trust will not charge for:

- Transporting registered learners to or from the School or College premises, where there is a statutory obligation to provide transport.
- Transporting registered learners to other premises where the Academy Trust or LAB has arranged for learners to be educated.
- Transport which enables a learner to meet an examination requirement when s/he has been prepared for the examination at the School or College.
- Transport provided in connection with an educational visit.

EDUCATION PARTLY DURING SCHOOL HOURS

Where an activity takes place partly during and partly outside school hours, the Trust will use guidance set out by the Department for Education (DfE) as the basis for determining whether it is deemed to be either inside or outside school hours. A charge will only be made for an activity outside school hours if it is not part of the

National Curriculum or not part of a syllabus for a prescribed public examination that the learner is being prepared for at the School or College and not part of religious education programme.

NON-RESIDENTIAL ACTIVITIES

If the majority (more than 50%) of the time spent on the activity occurs during the normal timetabled day, the entire activity will be deemed as having taken place during school or college hours. Time spent on travel counts within this calculation so long as the travel itself occurs during the timetabled day. School and college hours do not include the break in the middle of the day.

In circumstances where less than half of the time spent on an activity falls during the normal timetabled day, the entire activity will be deemed as having taken place outside of school or college hours. For example, an excursion might require learners to leave School or College an hour before the timetabled day ends, but the activity does not end until late in the evening.

RESIDENTIAL VISITS

If the number of school or college sessions taken up by the visit is equal to or greater than 50% of the number of half days spent on the visit, it is deemed to have taken place during school or college hours (even if some activities take place late in the evening). Whatever the starting and finishing times of the school or college day, regulations require that the school or college day is divided into two sessions. A 'half day' means any period of twelve hours ending with noon or midnight on any day.

Guidance revised in January 2009 cites the following examples:

Example 1: Visit during school hours

Learners are away from noon on Wednesday to 9.00pm on Sunday. This is interpreted as nine half days including five school sessions, so the visit is deemed to have taken place during school hours.

Example 2: Visit outside school hours

Learners are away from school from noon on Thursday until 9.00pm on Sunday. This is interpreted as seven half days including three school sessions, so the visit is deemed to have taken place outside school hours.

MUSIC TUITION

The Education and Inspections Act 2006 introduced a regulation-making power which allowed the Department to specify circumstances where charging can be made for music tuition. In consequence, the Trust will charge for teaching either an individual learner or small groups of learners to play a musical instrument or to sing. However, LABs will be required to meet the costs of any teaching or music tuition that is an essential part of the National Curriculum or a public examination syllabus being followed by the learner and organised through the School or College.

ARRANGEMENTS FOR MONITORING AND EVALUATION

The Academy Trust will monitor the impact of this policy by receiving termly feedback from the LABs on those activities resulting in charges being levied together with any subsidies awarded, duly analysed, indicating the source of the funding, particularly in relation to the Pupil Premium.

Updated	October 2025
Next Review Date	September 2026