

Charging and Remissions Policy



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Name of Document	Charging and Remissions Policy
Status	Approved
Date Approved	26 September 2024
Policy Approver	Trust Board of Directors
Policy Owner	Harold Reid, Chief Operating Officer
Primary Editor	Matt Lake, Governance Professional
Next Review Date	September 2025

Please note that all Trust policies are reviewed annually. Should you have any queries regards this policy, note an omission or wish to propose an amendment, please email mattheweldon.lake@thebridgetrust.academy

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1. Aims

Our Trust aims 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.

It's also based on guidance from the DfE on [statutory policies for schools and academy trusts](#).

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, and overall responsibility for monitoring the implementation of this policy.

Monitoring the implementation of this policy has been delegated to the Finance, Audit and Risk Committee.

4.2 Headteachers

Headteachers are 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 their Headteacher of any specific circumstances that they are unsure about or where they are not certain if the policy applies

Staff will be provided with appropriate training in relation to this policy and its implementation.

4.4 Parents/carers

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

5. Where Charges Cannot Be Made

Below is set out what the Trust **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 (although academy trusts don't have to follow the National Curriculum, it is not permissible to charge for education that is part of the National Curriculum)
 - A syllabus for a prescribed public examination that the pupil is being prepared for at one of the Trust's schools
 - 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 one of the Trust's schools
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at one of the Trust's schools

5.2 Transport

- Transporting registered pupils to or from school premises, where the relevant local authority (LA) has a statutory obligation to provide transport
- Transporting registered pupils to other premises where the relevant 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 one of the Trust's schools
- 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 one of the Trust's schools
 - Religious education
- › Supply teachers, covering for teachers who are absent from school, accompanying pupils on a residential visit

6. Where Charges Can Be Made

Below is set out what the Trust **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 one of the Trust's schools **and** the pupil fails, without good reason, to meet any examination requirement for a syllabus

6.2 Optional extras

The Trust is able to charge for activities known as 'optional extras'. In these cases, charges can be made 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 or core curriculum delivery of the relevant school
 - A syllabus for a prescribed public examination that the pupil is being prepared for at one of the Trust's schools
 - Religious education
- › Examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at one of the Trust's schools
- › Transport (other than transport that is required to take the pupil to school or to other premises where the relevant LA 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 within the Trust, where applicable, 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

The Trust can charge for board and lodging on residential visits, but the charge must not exceed the actual cost.

7. Voluntary Contributions

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

Some activities for which schools within the Trust may ask parents/carers for voluntary contributions include: school trips and sports activities.

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 funds are able to be raised by any schools within the Trust to cover the cost for an activity or visit then it will be cancelled.

8. Activities For Which the Trust Charges

For any regular activities which schools within the Trust seek to charge parents, charges for each activity will be determined by the relevant Headteacher in conjunction with the Trust's central Finance Team and reviewed in June each year. Parents/carers will be informed of the charges for the coming year in July each year.

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.

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 Finance Manager monitors charges and remissions and ensures these comply with this policy.

This policy will be reviewed by the Chief Operating Officer annually.

Following every review, the policy will be approved by the Trust Board of Directors.

Policy Owner and Contact Details

Harold Reid, Chief Operating Officer

For further information on the Policy, please phone 020 7619 1000

Next Review Date: September 2025