

Charter.

**Better futures
for children &
young people.**

Charging and Remissions Policy

Date policy last reviewed:	May 2026	Version	3
Next Review Date:	May 2028		
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Approved by:	CFO and CEO		

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Statement of intent

The Charter Schools Educational Trust (the 'Trust') is committed to ensuring equal opportunities for all pupils, regardless of financial circumstances, and has established the following policy and procedures to ensure that no child is discriminated against by our offering of school trips, activities and educational extras.

In addition, we are committed to adhering to legal requirements regarding charging for school activities, and meeting all statutory guidance provided by the DfE.

We promise:

- Not to charge for education provided during school hours.
- To inform parents on low incomes and in receipt of relevant benefits of the support available to them when asking for contributions towards the costs of school visits.

1. Legal framework

This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:

- Education Act 1996
- The Charges for Music Tuition (England) Regulations 2007
- The Education (Prescribed Public Examinations) (England) Regulations 2010
- Freedom of Information Act 2000
- Charging for school activities – advice for schools (DfE)
- Academy Trust Handbook
- The Trust’s Funding Agreement

This policy complies with our funding agreement and articles of association.

This policy operates in conjunction with the following school policies:

- Complaints Procedures Policy
- Freedom of Information Policy and Publication Scheme
- The Trust’s Scheme of Delegation
- The Trust’s Finance Policy

2. Roles and responsibilities

- **Headteachers:** The Headteacher is responsible for ensuring staff are familiar with the charging and remissions policy, and that it is applied consistently.
- **School Staff** are responsible for:
 - a) Implementing the charging and remissions policy consistently
 - b) Notifying the Headteacher of any specific circumstances which they are unsure about or where they are not certain if the policy applies The Trust will provide staff with appropriate training in relation to this policy and its implementation.
- **Parents** a) Parents are invited to notify staff or the Headteacher of any concerns or queries regarding the charging and remissions policy.

3. Activities we cannot charge for

The schools within The Charter Schools Educational Trust will not charge for:

Education

- a) provided during school hours (including the supply of any materials, books, instruments or other equipment).
- b) provided outside school hours if it is part of the national curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education.

- c) provided under the first access to the Key Stage 2 instrumental and vocal tuition programme unless the tuition is provided at the request of the pupil's parent

Transport

- a) provided in connection with an educational visit which is part of the national curriculum*. Costs can only be recovered as a voluntary contribution.
- b) For registered pupils to or from the school premises, where the local authority has a statutory obligation to provide transport.
- c) for registered pupils to other premises where the governing board or local authority has arranged for pupils to be educated
- d) that enables a pupil to meet an examination requirement when he or she has been prepared for that examination at the school.

Exams

- a) Entry for a prescribed public examination, if the pupil has been prepared for it at the school.
- b) re-sit(s) if the pupil is being prepared for the re-sit(s) at the school.

Supply teachers to cover for those teachers who are absent from school accompanying pupils on a necessary educational visit, whether residential or not.

*It should be noted that 'part of the national curriculum' is not restricted to learning outside the classroom experiences that are specifically subject based (e.g. geography or science fieldwork) and include, for example, activities designed to fulfil requirements under the national curriculum 'inclusion statement' (e.g. developing teamwork skills).

4. Activities we can charge for

Charges may be made for other activities known as **optional extras**. Where an optional extra is being provided, a charge may be made for providing materials, books, instruments, or equipment as follows:

- Any materials, books, instruments, or equipment, where the child's parent wishes him/her to own them
- Materials used in practical subjects and project assignments provided parents have agreed in advance that they or the pupil wish to keep the finished product e.g. ingredients or materials
- music and vocal tuition in certain circumstances
- Use of community facilities such as sports pitches, halls. (See Trust Lettings Policy).
- Additional nursery sessions over and above the free entitlement provided by the school. The Trust undertakes that all schools' charges for additional hours above any entitlement hours will be charged at the hourly rate determined by the school itself.
- Headteachers may determine if Remissions will apply for parents in receipt of Eligible Benefits and must publish this information on their websites. Charges will be reviewed in June each year for the following academic year and may be subject to revision provided one month's notice is given
- Provision of information within the scope of freedom of information.

A charge may also be made where an activity is an ***optional extra*** for the cost of teaching or non-teaching staff time spent organising or delivering an activity e.g. optional school trips, music tuition requested by parents, non-curriculum clubs or activities outside school hours, and staffing costs for non-essential residential visits.

5. Optional extras

The schools within the Trust may charge for the following optional extras:

- Education provided outside of school time that is not:
 - Part of the national curriculum
 - Part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school
 - Part of RE
- Examination entry fees where the pupil has not been prepared for the examinations at the school
- Transport, other than that required to take the pupil to school or to other premises where the Trust 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, (for example breakfast club, after-school clubs).

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

- Materials, books, instruments or equipment provided in relation to the optional extra
- Buildings and accommodation
- Non-teaching staff (including Teaching/Learning Support Assistants)
- Teaching staff 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

The school will not charge more than the actual cost of providing the optional extra divided by the number of participating pupils. A subsidy will not be charged for any pupils wishing to participate but whose parents are unwilling or unable to pay the full charge. In cases where a small proportion of the activity takes place during school hours, the school 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 based on parental choice and a willingness to meet the charges; therefore, parental agreement is a prerequisite for the provision of an optional extra where charges will be made.

If a charge is to be made for a particular activity, such as optional extras, parents will be informed of how the charge will be calculated.

6. Types of Visits

Visits fall under three categories

Type 1) Necessary Educational Visits	forms a part of National Curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or as part of religious education; May be within or outside school hours. It should be remembered that education provided during school hours must be free.	Charges may not be made but Voluntary Contributions may be requested.
Type 2) Optional Educational Visit	a visit which will enhance a pupil/student's education but is not a necessary part of the national curriculum or prescribed public examination that a pupil/student is being prepared for. The visit may be outside school hours.	Charge may be made as an Optional Extra .
Type 3) Optional School Trip	is organised for the enjoyment and expanding cultural/sporting horizons of children.	Charge may be made as an Optional Extra

7. Examination fees and resits

The school may charge for examination fees if:

- The examination is on the set list (which includes SATs, GCSEs, BTECs, T-Levels and A-levels as appropriate), but the pupil was not prepared for it at the school.
- The examination is not on the set list, but the school arranged for the pupil to take it.
- A pupil fails, without good reason, to complete the requirements of any public examination where the governing board paid or agreed to pay the entry fee.

Where a pupil is entered for a second or subsequent attempt at an examination, the school will pay the fee. Once pupils have left the school, resits must be taken at the school.

If a pupil or their parent considers it to be in the best interests of the pupil to request that an examination is re-marked, any fees involved must be covered by the pupil or their parent. If the awarding body changes the overall grade of the result, the school will not be charged by the awarding body and the parent or pupil will have their fees refunded.

8. Voluntary contributions

Although schools within the Trust cannot charge for school time activities, voluntary contributions may be sought from parents for activities that supplement the normal curriculum. If an activity cannot be funded without voluntary contributions, the school will make it clear to parents at the outset.

Requests to parents for voluntary contributions will state clearly that:

- a) there is no obligation to make a voluntary contribution
- b) pupils will not be excluded if parents cannot or chose not to pay
- c) pupils of parents who cannot contribute will not be treated any differently
- d) where there are not enough voluntary contributions to make the activity possible and there is no way to make up the shortfall, the activity will be cancelled, and this will be made clear to parents.

Any shortfall may be met from school fundraising, donations or allocated school budget e.g.Sport Premium.

Requests made for voluntary contributions must not include any element of subsidy for any other pupils wishing to participate in the activity whose parents are unwilling or unable to pay the full charge.

The school 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.

9. Music tuition

Instrumental and vocal music tuition is an 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 full cost of the provision, including the cost of the staff providing & administering the tuition.

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

Charging will also not be made if the teaching is provided under the first access to the KS2 Instrumental and Vocal Tuition Programme.

No charge will be made in respect of pupils who are LAC.

10. Transport

The school 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 board or LA has arranged for pupils to be educated.
- Transporting pupils to meet an examination requirement when they have been prepared for the examination at the school.
- Transport provided for an educational visit.

11. 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 the school may charge for the activity; however, the school 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 RE.

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

Any charges for extended day services will be optional.

12. Residential visits

The school 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 RE.
- Supply teachers to cover for teachers accompanying pupils on visits.

The school 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 benefits payments to be eligible for the exemption.

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, the school will not charge for the activity.

13. Damaged or lost items

Where a pupil/student's behaviour results in damage to school property or equipment, parents may be asked to pay for the necessary repair or replacement. Each incident will be dealt with on its own merit and at the school's discretion.

14. Remissions

Schools may set aside a small fund to enable families in financial difficulty to send their children on visits/activities. Individual Parent Teachers Associations' may also support school activities through funding raising. School 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 or allocated school budget, the trip/activity will be cancelled.

Individual schools may determine an allocation of Pupil Premium funding to support remissions for parents in receipt of Eligible Benefits, which will be determined by the Headteacher (Head of School). Any such remissions will be included in the statutory Pupil Premium report on each school's websites.

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

- 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 State Pension Credit
- Child Tax Credit, provided that they are not also entitled to Working Tax Credit and they 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)

To request assistance, parents should contact the relevant Headteacher (Principal) via the school office.

15. School trip refunds

The Trust recognises that circumstances may arise which require changes to planned school trips and visits. The following principles apply to refunds of contributions and charges:

15.1. Where a deposit is required for a school trip or visit, parents will be informed in advance whether the deposit is non-refundable and the reasons for this (for example, where the school is required to make non-refundable advance payments to a provider).

15.2. Where a school trip or visit is cancelled by the school, including due to foreseen or unforeseen circumstances, any contributions or charges paid by parents will be refunded, unless the school has already incurred irrecoverable costs. Parents will be informed of any such costs at the earliest opportunity.

15.3. Where a trip or visit is cancelled by a third party (for example, an external provider), the school will seek to recover any costs where possible. Refunds to parents will be issued where the school itself receives a refund, or where funds are otherwise recoverable.

15.4. Where a parent or pupil cancels a place on a trip or visit, refunds will be considered on a case-by-case basis. In reaching a decision, the school will consider:

- whether the school is able to recover the cost of the cancelled place
- whether the place can be offered to another pupil
- the reason for cancellation

The Trust recognises that last-minute cancellations may occur due to illness or other exceptional circumstances and will apply discretion where appropriate.

15.5. Where a trip or visit is postponed, the school will consult with parents and may:

- carry contributions forward to a rescheduled date
- offer the option to transfer contributions to an alternative visit
- provide refunds where costs are recoverable

15.6. Where contributions received exceed the total cost of a trip or visit, and the excess is greater than £1 per pupil, the surplus will be refunded or offset against future charges, at the school's discretion.

15.7. Any concerns regarding refunds will be managed in line with the Trust's Complaints and Concerns Policy.

16. Owed money and Debt Recovery

The Trust seeks to manage all debts fairly, proportionately and sensitively, recognising the financial pressures that some families may face.

16.1 General Principles: Where money is owed to the school, reasonable steps will be taken to secure payment. This may include:

- written reminders
- discussion with parents or carers

- offering repayment plans where appropriate

The Trust will take into account individual circumstances and will consider requests for reasonable payment arrangements in cases of financial difficulty.

16.2 Escalation of Debt Recovery

Where payment has not been received and no repayment agreement is in place, the Trust may consider further recovery action. Parents or carers will be informed in writing before any external action is taken.

In exceptional cases, and where proportionate, the Trust may refer the debt to a third-party debt recovery agency. Any such referral will be made in accordance with the Trust's Finance Policy and the Academy Trust Handbook.

16.3 Recovery Costs

Where the Trust incurs additional and reasonable costs in recovering a debt, it may seek to recover those costs from the debtor, provided these are clearly communicated in advance and are lawful and proportionate.

16.4 Vulnerability and Safeguarding

The Trust will not pursue debt recovery action where doing so would be unreasonable, cause undue hardship, or conflict with safeguarding responsibilities. Each case will be considered on its individual merits.

17. Income generation

In line with the 'Academy Trust Handbook', the Trust will set fees for chargeable services at full cost and reserves the right to apply an additional rate of return when in a commercial environment.

18. Freedom of Information Policy and Publication Scheme

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

19. Monitoring and review

This policy will be reviewed at least every two years by the Trust Head of Governance unless there are any significant changes to the statutory guidance. The next scheduled review date for this policy is **May 2028**.