



Charging, Remissions & Refund Policy

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Contents

1. Aims.....	2
2. Legislation and guidance.....	2
3. Definitions	2
4. Roles and responsibilities	2
5. Where charges cannot be made	3
6. Where charges can be made.....	4
7. Voluntary contributions	6
8. Activities we charge for.....	6
9. Remissions	7
10. Monitoring arrangements.....	7

1. Aims

Our school 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.

This policy also incorporates [The Charges for Music Tuition \(England\) Regulations 2007](#).

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 Board of Trustees

The Board of Trustees has overall responsibility for approving the charging and remissions policy, but can delegate this to a committee.

The board also has overall responsibility for monitoring the implementation of this policy.

Responsibility for approving the charging and remissions policy has been delegated to the Resources Committee.

Monitoring the implementation of this policy has been delegated to the Resources Committee.

4.2 Headteachers

The headteacher is 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 the headteacher/CFOO of any specific circumstances that they are unsure about or where they are not certain if the policy applies

The school will provide staff 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 any concerns or queries regarding the charging and remissions policy.

5. Where charges cannot be made

Below we set out what we **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
 - A syllabus for a prescribed public examination that the pupil is being prepared for at the school
 - 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 the school
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school

5.2 Transport

- Transporting registered pupils to or from the school premises, where the local authority (LA) has a statutory obligation to provide transport
- Transporting registered pupils to other premises where the governing board or 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 the school
- 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 the school
 - 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 we set out what we **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 the school **and** the pupil fails, without good reason, to meet any examination requirement for a syllabus

6.2 Optional extras

We are able to charge for activities known as 'optional extras'. In these cases, schools can charge 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
 - A syllabus for a prescribed public examination that the pupil is being prepared for at the school

- Religious education

- Examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school
- Transport (other than transport that is required to take the pupil to school or to other premises where the LA or governing 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 (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.

Any charge will not include the cost of supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential visit.

Parental agreement is necessary for the provision of an optional extra that is to be charged for.

6.3 Music tuition

Schools 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

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

Where a residential visit forms part of the National Curriculum, we will not exclude a pupil because their parent or carer cannot, or refuses to, pay or make a contribution to the board and lodging charge. We will consider if the costs can be covered from within the budget or by fundraising, and seek to reach an agreement with the parent/carers so that the pupil can still take part. In some cases, it may be necessary to cancel the visit.

When we inform parents/carers about a forthcoming visit, we will make it clear that parents/carers who can prove they are in receipt of certain benefits will be exempt from paying the cost of board and lodging.

7. Voluntary contributions

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

Some activities for which the school may ask parents/carers for voluntary contributions include:

- School trips including transport and entrance fees, in school 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.

There is no obligation for parents or carers to make any contribution, and no child will be excluded from an activity or visit if their parents or carers are unwilling or unable to pay. All pupils will have an equal chance to participate in an activity or visit regardless of whether their parents or carers contribute.

Our procedures for allocating places on school visits will be set out clearly to parents/carers.

When requesting voluntary contributions we will make it clear to parents/carers at the outset if the activity cannot be funded without voluntary contributions. We will also make it clear that contributions are not compulsory. We will not send communications when requesting contributions in a way that may make parents/carers feel pressured to pay, for example by sending colour-coded letters or direct debit or standing order mandates.

If the school is unable to raise enough funds for an activity or visit, and it cannot be funded from other sources, then it will be cancelled. This will be made clear to parents/carers.

8. Activities we charge for

The school will charge for the following activities:

Before and after school clubs and sports clubs. These clubs are run by our school staff and therefore charge is minimal and monies raised pays for club resources.

For regular activities, the charges for each activity will be determined by the school 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 Head Teacher and will depend on the activity in question.

All claims for remission of charges should be addressed to the Head Teacher and will be dealt with confidentially.

The academy may decide to subsidise part or all of the payment of some charges for certain activities and pupils, each event or case will be considered individually by the Head Teacher

Refunds Policy

School Meals

- Where payment for a school meal is received in advance and the pupil is absent due to illness, the funds will be retained to be used for future meals.
- If the academy has to cancel meal provision for a short time, the income received in advance will be recorded against each individual pupil to be used to cover future meals; where that amount exceeds £30 for any one pupil, the parent/carer may request a refund.
- When a pupil leaves the academy and income has been received but meals not taken, the parent is entitled to request a refund where the figure exceeds £10, or amounts will be retained in academy funds.

Educational Visits

- When a pupil is absent due to illness and does not attend an educational visit, the transport/entrance costs will not be refunded, where already committed. However, where possible, the academy will endeavour to recover costs related to that activity and, if successful, will then refund the parent/carer.
- If a trip has to be cancelled by the academy, parental contributions will be refunded, less any initial deposits withheld by the venue.
- Where contributions for an activity exceed the final total cost by more than £5 per pupil, a refund will be given. Excess income less than £5 per pupil will be retained in academy funds. Excess expenditure will be paid from academy funds.

10. Monitoring arrangements

The CFOO monitors charges, remissions and refunds, and ensures these comply with this policy.

This policy will be reviewed by the CFOO annually.

At every review, the policy will be approved by the Resources Committee.