



Charging and Remissions Policy

2024-2027

A handwritten signature in black ink, appearing to be "J. M.", is placed on a white rectangular background.

CEO SIGNATURE

A handwritten signature in black ink, appearing to be "R. D.", is placed on a white rectangular background.

CHAIR OF FINANCE AND AUDIT COMMITTEE

SIGNATURE

07/11/2024

DATE

Every three years

NEXT REVIEW DATE



Contents

1. Aims.....	3
2. Legislation and guidance.....	3
3. Definitions.....	3
4. Roles and responsibilities.....	3
4.1 The governing board.....	3
4.2 Headteachers.....	4
4.3 Staff.....	4
4.4 Parents/carers.....	4
5. Where charges cannot be made.....	4
5.1 Education.....	4
5.2 Transport.....	5
5.3 Residential visits.....	5
6. Where charges can be made.....	5
6.1 Education.....	5
6.2 Optional extras.....	6
6.3 Music tuition.....	7
6.4 Residential visits.....	7
6.5 Lettings.....	7
7. Voluntary contributions.....	8
8. Remissions.....	8
8.1 Remissions for residential visits.....	8
9. Freedom of Information.....	9
10. Monitoring arrangements.....	9



1. Aims

St Bartholomew's CE MAT ("the 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 governing board

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

The Trust 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 Finance & Audit Committee.



Monitoring the implementation of this policy has been delegated to the Director of Finance & Operations.

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 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.
 - Religious education.
- Instrumental or vocal tuition, for children learning individually or in groups, unless the tuition is provided at the request of the child's parent/carer.



- Entry for a prescribed public examination if the child has been prepared for it at the school.

5.2 Transport

- Transporting registered children to or from the school premises, where the Local Authority (LA) has a statutory obligation to provide transport.
- Transporting registered children to other premises where the school or LA has arranged for pupils to be educated.
- Transport that enables a child 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.
 - Religious education.
- Supply teachers, covering for teachers who are absent from school, accompanying children 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.



- Replacement of broken equipment where these were damaged or broken as a direct result of misconduct on the child's part. This does not in any way detract from the teaching staff's duty to brief children thoroughly and to manage a calm and safe working environment for the children.

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.
 - Religious education.
- Examination entry fee(s) if the registered child has not been prepared for the examination(s) at the school.
- Transport (other than transport that is required to take the child to school or to other premises where the LA or school has arranged for the child to be provided with education).
- Board and lodging for a child on a residential visit.
- Extended day services offered to children (such as breakfast clubs, after-school clubs, additional nursery / pre-school hours over and above the child's statutory entitlement, and supervised homework sessions).

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

- Any materials, books, instruments, food, 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.
- The cost of an external provider where they have been specifically engaged to provide the optional extra (i.e. a sports club).
- **Please note that with regards to clubs run by private companies, these are not part of the Charging and Remissions Policy as they are private concerns, and they will charge the parent/carer directly.**



Any charge made in respect of individual children will not be greater than the actual cost of providing the optional extra activity, divided equally by the number of children participating.

Any charge will not include an element of subsidy for any other children 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 children who do not wish to participate.

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

For regular optional extra activities, the charges for each activity will be determined by the Local Governing Board and reviewed in the summer term each year to be implemented from the following September for the new academic year. Parents/carers will be informed of the charges for the coming academic year in July each year.

6.3 Music tuition

Schools can charge for vocal or instrumental tuition provided either individually or to groups of children, provided that the tuition is provided at the request of the child'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.

6.4 Residential visits

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

6.5 Lettings

Please see the separate Trust policy that covers the letting of a school premises and estate.



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.
- 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 the school is unable to raise enough funds for an activity or visit, then it will be cancelled.

8. 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 Headteacher and will depend on the activity in question.**

8.1 Remissions for residential visits

Parents/carers who can prove they are in receipt of any of the following benefits **may be** exempt from paying the cost of board and lodging for residential visits, subject to the discretion of the Headteacher:

- 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).



9. Freedom of Information

Members of the public have a statutory right to ask for information under the Freedom of Information Act. Naturally, no charge is made by the school for information sourced from the School's Website.

For parents of present or prospective pupils (including parents/carers who wish information to help them decide if they wish for their child to attend the school), single copies of all relevant and available information are provided free of charge. However, should a request for information involve a large amount of non-standard paperwork or duplication, the school reserves the right to charge 10p per sheet to cover duplication and administrative costs.

When a member of the general public or a member of a professional body requests the information, then a charge will be made to cover duplication, postage and administrative costs.

In all cases where a cost is to be levied the purchaser will be informed of the cost and requested to pay the correct amount in advance, (by cash paid or cheque) before the work is undertaken.

10. Monitoring arrangements

The Director of Finance & Operations monitors charges and remissions and ensures these comply with this policy.

This policy will be reviewed by the Director of Finance & Operations on an **annual basis**.

At every review, the policy will be approved by the Finance & Audit Committee.