



Charging & Remissions Policy

(Statutory)

Approved: Summer 2026
Date of Next Review: Summer 2028

Equality Impact Assessment - Policy Review

In reviewing this policy, we have tried to make a positive impact on equality by considering and reducing or removing inequalities and barriers which already existed. We have ensured that this policy does not impact negatively on the dimensions of equality.

1. Purpose

The purpose of this policy is to ensure that charging and remission arrangements across The Roseland Multi Academy Trust ("the Trust") are lawful, transparent, equitable and consistently applied.

The Trust is committed to ensuring that all pupils have access to a broad and enriching educational experience, including educational visits, residential experiences, extracurricular activities and wider curriculum opportunities that support academic achievement, personal development and wellbeing.

This policy has been developed with reference to:

- The Education Act 1996
- Department for Education (DfE) guidance on Charging for School Activities
- Academy Funding Agreements
- The Academy Trust Handbook
- The Trust's Financial Regulations and Scheme of Delegation

The Trust will ensure that charges are applied in accordance with the principles of regularity, propriety, transparency and value for money.

2. Scope

This policy applies to all academies and settings within The Roseland Multi Academy Trust and covers:

- Charges for educational activities
- Educational visits and residential visits
- Voluntary contributions
- Music tuition
- Wraparound childcare, Nursery and extended services
- Community facilities
- Remissions and financial assistance
- Refunds
- Recovery of costs for loss or damage

3. Principles

The Trust's approach to charging and remissions is based upon the following principles:

1. Statutory Education provided during school hours is free of charge except where legislation permits otherwise.
2. Charges will only be made where legislation, statutory guidance or funding agreements allow.
3. No pupil should be disadvantaged or excluded from educational opportunities because of financial hardship.
4. Voluntary contributions may be requested to support enrichment opportunities and wider (non-statutory) educational experiences.

5. Public funds and parental contributions will be managed with regularity, propriety, transparency and value for money.
6. The Trust will seek to remove financial barriers to participation wherever reasonably possible.

4. Roles and Responsibilities

4.1 Trust Board

The Trust Board is responsible for:

- Ensuring compliance with statutory and regulatory requirements.

4.2 The Business & Finance Committee

The Committee is responsible for:

- Approving this policy.
- Reviewing the effectiveness of the policy.
- Providing oversight of charging and remission arrangements.
- Monitoring compliance with financial regulations and delegated authorities.

4.3 Chief Executive Officer

The CEO is responsible for ensuring consistent implementation of this policy across the Trust.

4.4 Chief Financial Officer

The CFO is responsible for:

- Monitoring compliance with this policy.
- Ensuring appropriate financial controls are in place.
- Supporting schools in the implementation of charging arrangements.

4.5 Headteachers/Heads of School

Headteachers/Heads of School are responsible for:

- Implementing this policy within their academy.
- Approving individual activity charges.
- Ensuring charges are communicated clearly to parents and carers.
- Authorising remissions and discretionary financial assistance within their delegated authority limits, taking account the individual circumstances of each case, the need for consistency across the Trust and the responsible management of public funds.

4.6 All other Staff

All other staff organising activities are responsible for:

- Preparing accurate costings.
- Applying this policy consistently.
- Referring any uncertainties to senior leaders.

5. Definitions

Charge

A fee payable for specifically defined activities or services.

Remission

The reduction or cancellation of a charge which would otherwise be payable.

Voluntary Contribution

A contribution requested from parents or carers towards the cost of an activity where no charge can legally be made.

Optional Extra

An activity for which charges may be made under legislation, typically provided wholly or mainly outside school hours and not forming part of the curriculum.

6. Activities for Which Charges Cannot Be Made

The Trust will not charge for:

6.1 Education

- Admission to any Trust academy.
- Statutory education provided during school hours.
- Education provided outside school hours where it forms part of:
 - The National Curriculum (or equivalent curriculum provision).
 - A syllabus for a prescribed public examination for which the pupil is being prepared by a Trust academy.
 - Religious Education.
- Books, materials, equipment and instruments required for curriculum delivery.
- Entry for prescribed public examinations where the pupil has been prepared by the academy.
- Examination re-sits where the pupil is being prepared by the academy.
- Breakfast club provision funded through a Department for Education (DfE) breakfast club programme, where pupils are entitled to attend free of charge under the terms of the funding.

6.2 Transport

The Trust will not charge for:

- Transporting registered pupils to and from school where there is a statutory entitlement.
- Transporting pupils to other premises where the Trust or Local Authority has arranged for statutory education to be provided.
- Transport required to enable a pupil to meet an examination requirement.
- Transport provided as part of curriculum-related educational visits.

6.3 Residential Visits

The Trust will not charge for:

- Statutory education provided during residential visits that takes place during school hours.
- Statutory education provided during residential visits that forms part of the curriculum, Religious Education or a prescribed public examination syllabus.
- Supply teachers accompanying pupils on residential visits.

7. Activities for Which Charges May Be Made

Charges may be made for:

7.1 Optional Extras

Including:

- Non-statutory Education provided outside school hours that is not part of:
 - The curriculum;
 - A prescribed public examination syllabus; or
 - Religious Education.
- Transport associated with optional activities.
- Board and lodging on residential visits.
- Extended day services, including non-DfE funded breakfast clubs, after-school clubs and holiday provision.
- Community facilities.

7.2 Materials and Equipment

Charges may be made for:

- Materials, ingredients, books, instruments or equipment where parents have indicated in advance that they wish to own the finished product or item.

7.3 Music Tuition

Charges may be made for individual or small-group instrumental or vocal tuition requested by parents where such tuition is not required as part of the curriculum or a prescribed examination course.

No charge will be made for:

- Tuition required as part of the curriculum.
- First access instrumental tuition programmes.
- Looked After Children receiving instrumental or vocal tuition.

7.4 Examinations

Charges may be made for:

- Examinations where the pupil has not been prepared by the academy.
- Examination re-scrutiny, review or remarking requested by parents.
- Examination fees where a pupil fails without good reason to meet examination requirements and the Trust incurs a cost.

7.5 Early Years (Nursery) and Wraparound Provision

Charges may be made for:

- Non-funded nursery hours.
- Additional childcare provision.
- Non-funded Breakfast clubs.
- After-school clubs.
- Holiday childcare provision.

7.6 Damage, Loss and Replacement Costs

The Trust may seek recovery of all or part of the cost of replacing or repairing property, equipment

or facilities where loss or damage results from deliberate acts, negligence or misuse.

8. Charging Principles

Charges will normally:

- Be calculated on a cost recovery basis.
- Not exceed the actual cost incurred by the Trust.
- Be applied fairly and consistently.
- Be approved in accordance with delegated authority arrangements.

The Trust may choose to subsidise activities from its own funds where this supports educational participation, inclusion or strategic objectives.

The Trust will seek to minimise both deficits and surpluses when setting charges for educational visits and activities, recognising that final costs may vary from estimates.

9. Voluntary Contributions

The Trust may request voluntary contributions towards the cost of:

- Educational visits.
- Residential experiences.
- Visiting speakers and workshops.
- Cultural, sporting and enrichment activities.
- Other activities that enhance the curriculum.

There is no obligation for parents or carers to make a contribution.

No pupil will be excluded from participation because a parent or carer is unwilling or unable to contribute.

The Trust will not place undue pressure on parents or carers to make voluntary contributions.

Where insufficient voluntary contributions are received to make an activity financially viable, the Trust reserves the right to cancel the activity and refund any monies collected.

10. Remissions and Financial Assistance

10.1 Statutory Remissions

The Trust will remit the cost of board and lodging for residential visits where parents or carers meet the eligibility criteria prescribed by current legislation and DfE guidance.

10.2 Discretionary Remissions

The Trust recognises that financial hardship should not prevent participation in educational opportunities.

Headteachers may approve full or partial remission of charges where appropriate, including but not limited to:

- Pupils eligible for Free School Meals.
- Pupil Premium eligible pupils.

- Looked After Children.
- Previously Looked After Children.
- Young carers.
- Families experiencing financial hardship.
- Exceptional personal or family circumstances.

The availability and extent of financial assistance will be subject to available resources.

10.3 Confidentiality

Applications for remissions or financial assistance will be handled sensitively, fairly and confidentially.

11. Refunds

11.1 Refunds

The Trust will endeavour to provide refunds where:

- An activity is cancelled by the academy.
- A pupil is unable to attend due to exceptional circumstances.
- Costs can be recovered from suppliers, insurers or third parties.

Refunds may be reduced where costs have already been incurred by the Trust.

Requests for refunds should be submitted in writing to the Headteacher and will be considered on an individual basis.

Refunds will normally be made using the original method of payment.

The Trust reserves the right not to provide a refund where a pupil is withdrawn from an activity as a result of a breach of the Behaviour Policy.

11.2 Residual Balances

Following the completion of an educational visit, residential visit or other chargeable activity, a small residual balance may remain once all income and expenditure have been finalised.

The Trust will seek to ensure that charges and voluntary contributions are set on a full cost recovery basis and will endeavour to minimise both surpluses and deficits wherever reasonably practicable.

Where a surplus remains, the Trust will endeavour to refund any balance due to parents or carers where it is practical and cost-effective to do so.

Where the amount due to an individual contributor is below the Trust's approved de-minimis refund threshold, or where the administrative and transaction costs of processing a refund would be disproportionate to the value of the refund, the Trust may retain the balance.

Any retained residual balances will be used to support pupils' participation in educational enrichment activities.

The de minimis refund threshold will be set and reviewed through the Trust's Financial Scheme of Delegation.

12. Debt Recovery

Outstanding debts will be managed in accordance with the Trust's Financial Scheme of Delegation (Debtors & Debt Recovery Procedure).

The Trust will seek to recover monies owed while taking account of individual circumstances and financial hardship where appropriate.

Any decision relating to participation in future chargeable activities will be considered on a case-by-case basis and in accordance with Trust's Financial Scheme of Delegation.

13. School Meals

Charges may be made for school meals provided to pupils who are not entitled to Free School Meals or Universal Infant Free School Meals.

The Trust encourages eligible families to opt-in to Free School Meals in order to access available support and enable academies to secure appropriate funding for disadvantaged pupils.

School meals debt will be managed in accordance with the Trust's Financial Scheme of Delegation (Debtors & Debt Recovery Procedure).

14. Equality, Inclusion and Confidentiality

The Trust is committed to promoting equality of opportunity and ensuring that charging arrangements do not create unnecessary barriers to participation.

The Trust will have due regard to:

- The Equality Act 2010.
- The Public Sector Equality Duty.
- The needs of disadvantaged and vulnerable pupils.

The Trust will seek to remove financial barriers wherever reasonably possible and ensure that requests for financial support are treated sensitively and confidentially.

15. Complaints

Complaints regarding the implementation of this policy or decisions made under it will be dealt with in accordance with the Trust Complaints Policy.

16. Charges for Published Information

The Trust aims to make information readily available at minimum cost and inconvenience.

No charge will normally be made for:

- Information published on Trust or academy websites.

- Information required under statutory publication schemes.

Charges may be made for:

- Photocopying.
- Printing.
- Postage and packaging.
- Costs incurred in providing information in alternative formats.
- Charges permitted under Freedom of Information legislation or other applicable regulations.

Any charges will be reasonable, transparent and communicated in advance.

17. Monitoring and Review

The Chief Financial Officer will monitor the implementation of this policy and ensure compliance across the Trust.

This policy will be reviewed bi-annually, or sooner where changes in legislation, DfE guidance, Academy Trust Handbook requirements or Trust operational needs require amendment.

The policy will be approved by the Trust Board's Business & Finance Committee.