



SOUTH WESTMORLAND  
MULTI ACADEMY TRUST

# Charging and Remissions Policy

<b>Committee:</b>	Delegated to Headteacher
<b>Date of adoption:</b>	30/04/2014
<b>Date of next review:</b>	Spring Term 2026

## Review Sheet

The information in the table below details earlier versions of this document with a brief description of each review and how to distinguish amendments made since the previous version date (if any).

<b>Version Number</b>	<b>Version Description</b>	<b>Date of Review</b>
1	Original – based on latest DfE guidance (October 2013)	30/04/2014
2	Risk Audit & Finance Committee review	23/03/2017
3	Risk Audit & Finance Committee review (DfE guidance May 2018)	27/02/2020
4	Risk Audit & Finance Committee review (updated DfE guidance)	04/03/2021
5	Risk Audit & Finance Committee review	03/03/2022
6	Risk Audit & Finance Committee review	07/03/2023
7	Risk Audit & Finance Committee review	05/03/2024
8	Headteacher and Senior Leadership Team review and approval	01/04/2025

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## 1. Rationale

This policy is based on the law and Department for Education (DfE) guidance on [charging for school activities](#) and the [Education Act 1996](#), sections 449-462 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 complies with our funding agreement and articles of association.

This Policy does not apply to charges we make for the hire of our school facilities, which are handled separately under hire agreements, or charges made and determined by other organisations offering activities and services on the school premises e.g., a sports club that hires our hall to meet in and charges its members to attend.

## 2. Purpose

The aim of this policy is to set out what charges will be levied for activities, what remissions will be implemented and the circumstances under which voluntary contributions will be requested from parents:

- **Charge** - a fee payable for specifically defined activities
- **Remission** - the cancellation of a charge which would normally be payable
- **School hours** - the hours when school is in session and which do not include the lunch break e.g., each weekday 8:40am-12:30pm and 1:15pm-3:15pm.

## 3. Roles and Responsibilities

### 3.1 The MAT Board

The MAT Board has overall responsibility for approving the charging and remissions policy, but has delegated responsibility for monitoring and recommending approval to the Headteacher.

### 3.2 Headteachers

The Headteacher is responsible for ensuring staff are familiar with the charging and remissions policy, and that it is being applied consistently.

### 3.3 Staff

Staff are responsible for:

- Implementing the Charging and Remissions Policy consistently
- Notifying the Headteacher of any specific circumstances which they are unsure about or where they are not certain if the policy applies

The school will provide staff with appropriate advice in relation to this policy and its implementation.

### 3.4 Parents and Carers

Parents and carers are expected to notify staff or the Headteacher of any concerns or queries regarding the Charging and Remissions Policy.

## 4. Prohibition of Charges

### 4.1 Education

- Admission or applications for admission
- Education provided wholly or mostly 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, you still can't charge for education that is part of the national curriculum), or part of a syllabus for a prescribed public examination that the student is being prepared for at the school, or part of religious education
- Instrumental or vocal tuition, for students learning individually or in groups, unless the tuition is provided at the request of the student's parent
- Entry for a prescribed public examination, if the student has been prepared for it at this school
- Examination re-sit(s) if the student is being prepared for the re-sit(s) at this school

#### 4.2 Transport

- Transporting registered students to or from the school premises, where the local authority would have a statutory obligation to provide transport
- Transporting registered students to other premises where the local advisory committee has arranged for students to be educated
- Transport that enables a student to meet an examination requirement when he/she has been prepared for that examination at the school
- Transport provided in connection with an educational trip

#### 4.3 Educational Visits

- Education provided on any trip that takes place during school hours if it is part of the national curriculum, or part of a syllabus for a prescribed public examination that the student is being prepared for at the school
- Education provided on any trip that takes place outside school hours if it is part of the national curriculum, or part of a syllabus for a prescribed public examination that the student is being prepared for at the school, or part of religious education
- Supply teachers to cover for those teachers who are absent from school accompanying students on a residential visit

#### 4.4 School Milk Scheme (This applies to all children aged 5-18 who are entitled to a free school meal)

Under *'The Requirements for School Food Regulations 2014'*, we will make lower fat milk or lactose reduced milk available for drinking at least **once** a day during school hours at a fair cost or free of charge to all pupils who are entitled.

Children who have reached the age of 5 and have not yet reached the age of 19 can continue to receive up to one third of a pint of milk free of charge if their family has been able to successfully [apply for free school meals - GOV.UK \(www.gov.uk\)](#).

#### 4.5 School Meals

School meals are available to pupils at a cost of £3.15 per day or free of charge to the pupils of families entitled to free school meals.

Families can find out how to [Apply for free school meals - GOV.UK \(www.gov.uk\)](#) or they can apply directly to their home Local Authority at [Citizen Portal - Sign in \(westmorlandandfurness.gov.uk\)](#), [Lancashire free school meals Online Form \(achieveservice.com\)](#). Families needing help to do this can ask at the Pastoral Hub.

## 5. Charges

### 5.1 Education

- any materials, books, instruments, or equipment, where the student's parent wishes him/her to own them
- optional extras (see 5.2)
- music and vocal tuition requested by the student's parent (charges may not exceed the cost of the provision, including the cost of staff who provide the tuition)
- community facilities provided under section 27 of the Education Act
- to cover the cost of materials/ingredients for subjects such as design or food technology where parents have indicated in advance they would like their child to bring the finished product home

### 5.2 Optional Extras

Charges may be made for some activities that are known as 'optional extras'. Where an optional extra is being provided, a charge can be made for providing materials, books, instruments, or equipment. Optional extras include:

- 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 student is being prepared for at the school
  - part of religious education
- examination entry fee(s) or resits if the registered student has not been prepared for the examination(s) at the school
- transport (other than transport that is required to take the student to school or other premises where the MAT Board have arranged for the student to be provided with education)
- board and lodging on residential visits (not to exceed the costs)
- extra-curricular activities and school clubs
- breakages and replacements as a result of damages caused wilfully or negligently by students
- any other education, transport or examination fee unless charges are specifically prohibited

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

- materials, books, instruments, or equipment provided in connection with the optional extra
- cost of buildings and accommodation
- non-teaching staff
- teaching staff engaged 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 musical or vocational tuition where this is an optional extra
  
- Any charge made to individual students must not exceed the actual cost of providing the optional extra activity and must be divided equally by the number of students participating. It must not include an element of subsidy for any other students wishing to participate in the activity whose parents are unwilling or unable to pay the full charge.

### 5.3 State Boarding Schools

- overnight boarding and lodging
- extended day services offered to day students, for example breakfast clubs, after school clubs, tea and supervised homework sessions

## 5.4 Music Tuition

Although the law states that, in general, all education provided during school hours must be free, instrumental and vocal music tuition is an exception to that rule.

The Charges for Music Tuition (England) Regulations 2007 set out the circumstances in which charges can be made for tuition in playing a musical instrument, including vocal tuition. They allow charging for tuition in larger groups than was previously the case.

Charges may now be made for vocal or instrumental tuition provided either individually, or to groups of any size, provided that the tuition is provided at the request of the pupil's parent. Charges may not exceed the cost of the provision, including the cost of the staff who provide the tuition.

The regulations make clear that charging may not be made if the teaching is an essential part of the national curriculum. They also make clear that no charge may be made in respect of a pupil who is looked after by a local authority.

## 6. Charges and Remissions

The principles of best value will be applied when planning activities that incur costs to school and/or charges to parents and carers.

When charges are made for activities, they will be based on the actual costs incurred, divided by the total number of pupils participating. There will be no levy on those who can pay to support those who can't. Support for cases of hardship will come through applicable funding such as pupil premium money, specified voluntary contributions, Dallam School Charitable Trust Hardship Fund and fundraising.

In some circumstances, school may not charge for items or activities set out in section 5 of this policy. This waiving of charges is called remission. It will be at the discretion of the Trust Board and will depend on the reasons for the charges and the circumstances of the recipients.

Pupils who are looked after by a local authority or whose parents or carers are receiving specified benefits are entitled to full remission of some charges outlined in Section 5. This entitlement is subject to change but usually equates to pupils being eligible for free school meals. To find out which benefits are specified and eligible for full remission, see information on how to [Apply for free school meals - GOV.UK](https://www.gov.uk/guidance/apply-for-free-school-meals) ([www.gov.uk](https://www.gov.uk)).

Charges for other 'chargeable activities' may also be fully or partly remitted. Where appropriate trustees can approve the use of the delegated budget and other funding streams such as Pupil Premium to allow 'chargeable activities' to be fully or partly remitted. Details of any remission arrangements will be made clear when parents and carers are informed of charges for individual activities.

## 7. Voluntary Contributions

Academy schools are legally allowed to ask for voluntary contributions for the benefit of the school or any school activities. Academy Headteachers are responsible for ensuring parents are made aware that there is no obligation to make any contribution, but if an activity cannot be funded without voluntary contributions, then it will not take place.

The protocol for voluntary contributions is:

- Parents will be invited to make voluntary contributions for school activities in or out of school time for which compulsory charges cannot be levied but which can only be provided if there is sufficient voluntary funding, whilst ensuring that no student is excluded from such activity by reason of inability or unwillingness to make a voluntary contribution
- The terms of any request made to parents will specify that the request for a voluntary contribution in no way represents a charge. In addition, the following will be made clear to parents:
  - that the contribution is genuinely voluntary and a parent is under no obligation to pay

- that registered students at the school will not be treated differently according to whether or not their parents have made any contribution in response to the request
- Voluntary contributions may be used to fund:
  - board and lodging
  - travel
  - materials and equipment
  - staffing costs (including administration costs)
  - entrance fees
  - insurance costs
- It is also the policy of the MAT Board to:
  - leave to Academy Headteachers discretion the proportion of costs of an activity which should be charged to public or non-public funds
  - delegate to Academy Headteachers the determination of any individual case arising from the implementation of this policy

## **8. Review**

This policy is formally reviewed by the Headteacher and Senior Leadership Team on an annual basis.