CHARGING AND REMISSIONS POLICY

Policy Owner	Chief Finance Officer
Senior Policy Owner	Chief Finance Officer
Document Created	July 2025
Ratified by the Board of Trustees on	16th July 2025
Signed by the Chair of Trustees	
This Policy will be reviewed by the Trust annually. Next review date:	July 2026

Changes to Policy July 2023

1. ***Academies Trust Handbook updated to 2023***

5. Added in final paragraph: *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.*

12. Refunds on trips: *increased from £1 to £3.*

Changes to Policy July 2024

1. ***Academies Trust Handbook updated to 2025***

12. Refunds on trips: *increased from £3 to £10*

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Statement of intent

Epping Forest Schools Partnership 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
- Children Act 1989
- The Charges for Music Tuition (England) Regulations 2007
- The Education (Prescribed Public Examinations) (England) Regulations 2010
- Freedom of Information Act 2000
- DfE (2018) 'Charging for school activities'
- DfE (2020) 'Governance handbook'
- The trust's Funding Agreement
- Academy trust handbook 2024 (ATH)

This policy operates in conjunction with the following school policies:

- Complaints Procedures Policy
- Debt Recovery Policy
- Freedom of Information Policy
- The school's Scheme of Delegation

2. Charging for education

The school will not charge for:

- 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, part of a syllabus for a prescribed public examination that the pupil is being prepared for by the school, or part of RE.
- Instrumental or vocal tuition, for pupils learning individually or in groups, unless provided at the request of the pupil's parent.

The school may charge for:

- Materials, books, instruments or equipment, where the child's parent wishes their child to own them.
- Optional extras.
- Music tuition (in certain circumstances).
- Certain early years provision.
- The use of community facilities and other commercial activities.
- Provision of information within the scope of freedom of information.

3. Optional extras

The school 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, e.g. breakfast or out-of-school provision
- School dinners where the pupil is not entitled to a free school meal either through universal infant free school meals or the free school meal entitlement.

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 TAs)
- 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 in excess of 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 on the basis of 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.

4. Voluntary contributions

The school may, from time-to-time, ask for voluntary contributions towards the benefit of the school or school activities. If an activity cannot be funded without voluntary contributions, the school will make this clear to parents at the outset. There is no obligation for parents to make a contribution and parents will be notified regarding whether assistance is available.

No pupil will be excluded from an activity simply because their parents are unwilling or unable to pay. If a parent is unwilling or unable to pay, their child will still be given an equal opportunity to take part in the activity. If insufficient voluntary contributions are raised to fund an activity, and the school cannot fund it via another source, the activity will be cancelled.

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.

5. 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 cost of the provision, including the cost of the staff providing 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.

6. 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 trust board or LA has arranged for pupils to be educated.
- Transport provided for an educational visit.

7. 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.

8. 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 benefit payments in order 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.

9. Damaged or lost items

The school may charge for the cost of replacing items that are damaged or lost due to the negligence or poor behaviour of pupils or their parents. Parents will only be charged the replacement cost to purchase the same or equivalent item. The school will consider waiving costs in exceptional circumstances, e.g. financial hardship.

10. Remissions

The school has set aside a fund to enable parents in financial difficulty to send their children on visits and activities. The funding is limited and there is no guarantee that all requests can be met. Assistance will be allocated on a needs basis, and if the full cost of the trip or activity cannot be met through assistance funding and voluntary contributions, the trip or activity will be cancelled.

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 school office in the first instance.

11. School trip refunds

All initial deposits for school trips will be non-refundable. Parents will be informed of this when they are provided with initial information about the trip.

In the event that the school has to cancel a trip due to foreseen circumstances, parental contributions will be refunded. In the event that a school trip is cancelled by a party other than the school due to unforeseen circumstances, it is at the school's discretion as to whether a refund is given to parents.

In the event that a pupil or their parents cancel the pupil's place on a trip, it is at the school's discretion as to whether a refund is given. The school will take into account the reason for cancellation, whether the school will be reimbursed for the pupil's place on the trip, and whether the place on the trip can be offered to another pupil.

Where a pupil or their parents have previously cancelled a place on a trip and received a full refund, the school has the right to refuse to allow the pupil to attend future trips and visits.

In the event that a pupil cannot attend a trip at the last minute, e.g. due to illness, it is at the school's discretion as to whether a refund is given. The school will take into account whether the school will be reimbursed for the pupil's place on the trip and whether the place on the trip can be offered to another pupil.

In the event that a school trip is postponed due to unforeseen circumstances, it is at the school's discretion as to what happens with the parental contributions for the trip. The school will consider its options, which could include carrying forward the money until the trip takes place, transferring the money to another trip, or refunding parents.

In the event that the decision is made to postpone a trip due to foreseen circumstances, it is at the school's discretion as to what happens with the parental contributions for the trip. The school will consider its options, which could include carrying forward the money until the trip takes place, transferring the money to another trip, or refunding parents.

Once trip arrangements have been booked and confirmed, if contributions exceed the total cost of the trip, a refund will be given where the excess is greater than £3 per pupil.

The school will deal with cancellations and refunds on a case-by-case basis, ensuring that all pupils and their families are treated equally.

If a parent wishes to make a complaint about refunds, they can do so via the Complaints Procedures Policy.

12. Income generation

In line with the ESFA's '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.

13. Freedom of Information Policy and Publication Scheme

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

14. Monitoring and review

This policy will be reviewed at least **annually** by the governing board. The next scheduled review date for this policy is **July 2026**