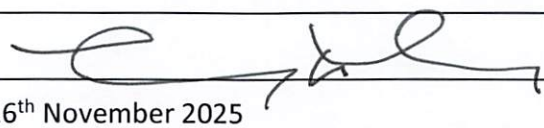
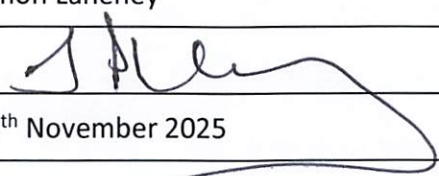
FURNESS EDUCATION TRUST

Seamless education built on collaboration.

CHARGING AND REMISSIONS

Approved by: Finance and General Planning and Audit and Risk Committee	
Trustee	Gary Booton
Signed:	
Date:	26th November 2025
Chief Executive Officer	Simon Laheney
Signed:	
Date:	26th November 2025

Policy Owner:	Chief Financial Officer
Implementation Date	Autumn 2025
Review Date:	Autumn 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).

Version Number	Version Description	Date of Revision
1	Original	Spring 21
2	Reviewed July 22 – no amendments made	July 22
3	Reviewed Nov 23 – Amendments made to Remissions section	Nov 23
4	Reviewed Nov 24 – **Amendments:** Section 1 aims Added point to reflect information in the policy around exemptions Section 2 legislation and guidance Added a link to the DfE's statutory policies and documents to make it clearer where information in the policy has come from Section 7 voluntary contributions Removed reference to activities 'during school hours' as the DfE's guidance does not specify when these activities must take place	Nov 24
5	Addition of Chief Financial Officer role	Nov 25

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1. Aims

Our Trust aims to:

a. Have robust, clear processes in place for charging and remissions
b. Clearly set out the types of activity that can be charged for and when charges will and will not be made
c. 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 is 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 Trust Board

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

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 Chair of the Trust Board and the Chief Executive Officer.

Monitoring the implementation of this policy has been delegated to the Finance and General Planning Committee and Audit and Risk Assurance Committee.

4.2 Headteachers

The Chief Executive Officer and Headteachers are 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:

a. Implementing the charging and remissions policy consistently
b. 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 training in relation to this policy and its implementation.

4.4 Parents

Parents 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

a. Admission applications
b. Education provided during school hours (including the supply of any materials, books, instruments or other equipment)
c. Education provided outside school hours if it is part of:
    i. The national curriculum
    ii. A syllabus for a prescribed public examination that the pupil is being prepared for at the school
    iii. Religious education
d. Instrumental or vocal tuition, for pupils learning individually or in groups, unless the tuition is provided at the request of the pupil's parent
e. Entry for a prescribed public examination if the pupil has been prepared for it at the school
f. Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school

5.2 Transport

a. Transporting registered pupils to or from the school premises, where the local authority has a statutory obligation to provide transport
b. Transporting registered pupils to other premises where the governing board or local authority has arranged for pupils to be educated
c. Transport that enables a pupil to meet an examination requirement when he or she has been prepared for that examination at the school
d. Transport provided in connection with an educational visit

5.3 Residential visits

a. Education provided on any visit that takes place during school hours
b. Education provided on any visit that takes place outside school hours if it is part of:
    i. The national curriculum
    ii. A syllabus for a prescribed public examination that the pupil is being prepared for

at the school
iii. Religious education

c. Supply teachers to cover for those 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

a. Any materials, books, instruments or equipment, where the child's parent wishes him or her to own them
b. Optional extras (see below)
c. Music and vocal tuition, in limited circumstances
d. Certain early years provision
e. Community facilities

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:

a. Education provided outside of school time that is not part of:
   i. The national curriculum
   ii. A syllabus for a precribed public examination that the pupil is being prepared for at the school
   iii. Religious education
b. Examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school
c. Transport (other than transport that is required to take the pupil to school or to other premises where the local authority or governing board has arranged for the pupil to be provided with education)
d. Board and lodging for a pupil on a residential visit
e. 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:

a. Any materials, books, instruments or equipment provided in connection with the optional extra
b. The cost of buildings and accommodation
c. Non-teaching staff
d. Teaching staff engaged under contracts for services purely to provide an optional extra (including supply teachers engaged specifically to provide the optional extra)
e. 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 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.

Parental agreement is necessary for the provision of an optional extra which 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.

Charges may not exceed the cost of the provision, including the cost of the staff giving the tuition.

Charges cannot be made:

a. If the teaching is an essential part of the national curriculum
b. If the teaching is provided under the first access to the Key Stage 2 instrumental and vocal tuition programme
c. For a pupil who is looked after by a local authority

6.4 Residential visits

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

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: e.g. theatre visits, school trips, sports/games activities and university visits.

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. Activities we charge for

The school will charge for the following activities:

For regular activities, the charges for each activity will be determined by the governing board and reviewed in July each year. Parents/carers will be informed of the charges for the coming year in July each year.

8.1 Before and/or after School Care

Charges will be made for any childcare services offered to pupils before school, after school and during school holidays, with the level of fees and any remissions to be set and reviewed regularly by the Trust Board or individual service provider e.g. Breakfast Club and After School Club.

9. School Milk Scheme

Up to one third of a pint of milk is available to all children free of charge, regardless of their family circumstances up to the age of 5.

Children who have reached the age of 5 and have not yet reached the age of 19 can continue to receive free school milk if their family is in receipt of free school meals.

Following changes in legislation in 2015 regarding the availability of milk at school, all infant children who are entitled to a free school meal under the Universal Free School Meals Scheme can also now choose milk with a fat content of no more than 1.8% as part of their free meal at lunchtime. All children not eligible for free school meals can also choose to drink milk as part of the school dinner that parents pay for.

10. Damage to Property and Breakages

The Trust will attempt to recover some or all of the costs incurred repairing willful or culpably negligent damage or breakage of school property or such damage or breakage of property belonging to a third party where the school has been charged. The actual amount will be determined by the Headteacher.

11. 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 governing board and will depend on the activity in question.

9.1 Remissions for residential visits

Parents who can prove they are in receipt of any of the following benefits will be exempt from paying the cost of board and lodging for residential visits:

a. Income Support
b. Income-based Jobseeker's Allowance
c. Income-related Employment and Support Allowance
d. Support under part VI of the Immigration and Asylum Act 1999
e. The guaranteed element of Pension Credit
f. 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
g. Working Tax Credit run-on – paid for 4 weeks after you stop qualifying for Working Tax Credit
h. 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)

12. Monitoring Arrangements

The Chief Financial Officer monitors charges and remissions and ensures these comply with this policy.

This policy will be reviewed by the Chief Financial Officer every 12 months.

At every review, the policy will be approved by the Chair of the Trust Board and the Chief Executive Officer.