

**Ascend Learning Trust**

**CHARGING AND REMISSIONS POLICY**

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## 1.0 INTRODUCTION

Under the terms of the Education Act 1996, the governing body of a school may choose to charge for certain activities, and to request contributions for other activities. Ascend Learning Trust (the Trust), which is bound by way of its master funding agreement to abide by the relevant terms of the Act, endorses the guiding principles contained within the Act, in particular that no child should have his/her access to the curriculum limited by charges.

### Definitions

- **Charge:** a fee payable for specifically defined activities
- **Remission:** the cancellation of a charge which would normally be payable

## 2.0 PRINCIPLES

The Trust recognises its responsibility to ensure that the offer of activities and educational visits does not place an unnecessary burden on family finances. To this end schools will try to adhere to the following guidelines:

- Schools will publish a list of standard regular visits (and their approximate cost) at the beginning of the school year so that parents can plan ahead
- Schools have an established system for parents to pay in instalments
- Schools acknowledge that offering opportunities on a 'first pay, first served' basis discriminates against pupils from families on lower incomes and we will avoid that method of selection
- Where trips are over subscribed the Trust will operate a random selection from a draw

## 3.0 ROLES AND RESPONSIBILITIES

### 3.1 The Board of Trustees

The board of trustees has overall responsibility for approving the charging and remissions policy. Monitoring the implementation of this policy has been delegated to the Finance, Audit & Risk Committee.

### 3.2 Headteachers/Executive Headteacher

The Headteachers/Principals and Executive Headteacher of each school(s) is responsible for ensuring staff are familiar with the charging and remissions policy, and that it is being applied consistently, and that advice and assistance can be sought from the Finance Team. The board of trustees will leave to the discretion of the Headteacher/Executive Headteacher the decision as to the proportion of the cost of activities which should be charged to public or non-public funds and when to request donations.

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### **3.3 Staff**

Staff are responsible for:

- Implementing the charging and remissions policy consistently
- Notifying the Headteacher/Executive Headteacher of the relevant school of any specific circumstances which they are unsure about or where they are not certain if the policy applies. The trust will provide staff with appropriate training in relation to this policy and its implementation.

### **3.3 Parents**

Parents are expected to notify staff or the Headteacher/Head of School of any concerns or queries regarding the charging and remissions policy.

## **4.0 ACTIVITIES FOR WHICH CHARGING IS NOT PERMITTED**

### **4.1 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
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the school
  - Religious education
  - Instrumental or vocal tuition, for pupils learning individually or in groups, unless the tuition is provided at the request of the pupil's parent
- Entry for a prescribed public examination if the pupil has been prepared for it at the school
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school.

### **4.2 Transport**

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

### **4.3 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
  - A syllabus for a prescribed public examination that the pupil is being prepared for at

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- the school
  - Religious education
  - Supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential visit.

## **5.0 ACTIVITIES FOR WHICH CHARGING IS PERMITTED**

The Trust policy is that the full cost of the activities listed in section 4 will be passed on to parents/ carers at all schools.

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

### **5.1 Optional extras**

The Trust is able to charge for activities known as 'optional extras'. The following are optional extras:

- Education provided outside of school time that is not part of:
  - The national curriculum
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the school
  - Religious education
- Examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school
- Transport (other than transport that is required to take the pupil to school or to other premises where the local authority/governing 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 (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:

- Any materials, books, instruments 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)

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- 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.

## **5.2 Music tuition**

The school 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:

- 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
- For a pupil who is looked after by a local authority

## **5.3 Residential visits**

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

See section 8.1 for information on fee remission relating to residential visits.

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## 6.0 CALCULATION OF CHARGES

The Trust will apply the following principles when calculating costs that are to be charged to pupils:

The following will be included in the calculation:

- Any materials, books, instruments or equipment provided in connection with the optional extra
- The cost of buildings and accommodation
- Non-teaching staff required to undertake the activity
- 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

Charges will not include any subsidies for any other pupils wishing to participate in the activity 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 will not include the cost of alternative provision for those pupils who do not wish to participate.

An administration fee may be added to cover the costs of using a cashless payment system (where fees are charged by the cashless provider to the school/Trust) and other administration required to organise the trip/activity.

The intention is that all trips and visits will not run at a profit. If it is found that there are surplus funds within a trip or visit when the final balances are reconciled by the Finance Team, then a payment will be returned to paying parents/carers where the per pupil balance is in excess of £5.

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## 7.0 REFUNDS

Requests for refunds for activities will be considered on an individual basis and may be rejected if the school is unable to recoup the costs incurred.

In all cases of withdrawal, either voluntary or otherwise, applications should be made in writing to the Headteacher. If approved, refunds will be processed via the original method of payment.

The school reserves the right not to refund costs where a pupil is withdrawn from an activity by the school on the basis of a pupil's breach of the school's behaviour policy.

## 8.0 VOLUNTARY CONTRIBUTIONS

There will be some trips or activities which the school cannot charge for but which the school considers would be beneficial to the students. In this case the school may ask for voluntary contributions. No student / child will be refused a place on the grounds that their parents/carers do not wish to make a financial contribution, but unless a substantial number of parents wish their child to take part and are willing to make a contribution, the visit may not take place. Arrangements will be made for children/students whose parents do not wish them to attend.

NB. Any request for voluntary contributions must contain the paragraph highlighted below to make it lawful.

The school cannot exclude a child from taking part in an activity that is part of the national curriculum purely on the grounds that the parent or carer cannot make, or refuses to make, a contribution. This can clearly place schools in some difficulty on occasions where a number of parents/carers might be in such a position. The school then has to decide whether they can cover the costs of such activity from within the budget or by fundraising, or whether the activity has to be cancelled.

## 9.0 OTHER CHARGES THAT MAY BE IMPOSED

The Trust reserves the right to charge parents/carers for:

- willful damage to school property, or the misuse or loss of books and equipment.
- costs made against the school due to financial processes resulting from returned parental cheques or late payments
- If a parent requests a remark on an exam paper, the parents are responsible for paying for it. However, in certain cases, the school may offer to cover the cost of the remark, depending on its own judgment.
- If a student fails to turn up for an exam that the school has paid for without a valid explanation, the school has the right to charge the student or parent for the exam.

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## 10.0 REMISSIONS

### 10.1 Parents on Benefits

Parents/carers who can prove they are in receipt of the following benefits may be exempt from paying certain costs (including the cost of board and lodging related to residential visits). Parents should be made aware of this when trips are announced.

- Income Support
- Income based Job-seekers Allowance
- Income related Employment and Support allowance
- Child Tax Credit (where the person is not receiving Working Tax Credits as well and has an annual gross income of no more than £19,994)
- Support under part VI of the Immigration and Asylum Act 1999
- Guaranteed element of the State Pension Credit
- Working Tax Credit run-on (this is paid for 4 weeks after an individual stops qualifying for Working Tax Credit)
- Universal Credit
- The full cost of board and lodging on residential visits in school time
- The full cost of board and lodging on residential visits outside school time which are covered by the following criteria:
  - where the purpose is to fulfil any requirements specified in the syllabus for a prescribed public examination
  - where the purpose is to fulfil statutory duties relating to the National Curriculum imposed by Section 88 of the Education Act 2002

### 10.2 Remissions for other charges

Parents and carers of children in receipt of free school meals (or the benefits listed in 8.1) may be eligible for full or part remission of certain other charges. The relevant charges are listed in section 4 of this policy, with the exception of 'extended day services' which shall be chargeable at all times.

### 10.3 Applying for remission of charges

Parents and carers will be asked to complete a 'Request for Remission of Charges' form for each activity for which a remission of charges is requested. This includes activities for which the school has a statutory obligation to grant a remission (8.1,8.2). An example of this form can be found in Appendix 1 below. Remission will normally be for the full amount of the charge, however where discretion is permitted, the Headteacher / Principal may propose a partial remission.

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## **11.0 Monitoring Arrangements**

The Headteacher/Head of School monitors charges and remissions at school level, and ensures these comply with this policy. This policy will be reviewed by the Finance, Audit and Risk Committee every 2 years.

**APPENDIX 1: REQUEST FOR REMISSION OF CHARGES**

<b>Pupil Name</b>	
<b>School</b>	
<b>Year/Class</b>	
<b>Activity Details</b>	
<b>Date of Activity</b>	
<b>Eligible for FSM</b>	Yes / No
<b>I confirm that I am in receipt of one the following benefits: (delete as appropriate)</b>	
<b>Income Support</b>	Yes / No
<b>Universal Credit</b>	Yes / No
<b>Income Based Job seekers Allowance</b>	Yes / No
<b>Support under part VI of the Immigration and Asylum Act 1999</b>	Yes / No
<b>Child Tax Credit, provided that they do not also receive Working Tax Credit and have an annual income assessed by the Inland Revenue that does not exceed an income related employment and support allowance.</b>	Yes / No
<b>The guarantee element of State Pension Credit</b>	Yes / No
<b>An income related employment and support allowance that was introduced on 27 October 2008.</b>	Yes / No
<b>If answering YES, please write which benefit(s) here and provide evidence:</b>	
Signed	
Parent/Carer	Date:
<b>Office use only:</b>	
CERTIFICATION	
Free meals review date:	
Evidence sighted and copied:	
Headteacher/Delegated authority signature: ..... Date .....	
Full remission..... Partial remission (please specify).....	

<sup>i</sup> The responsible officer must keep the policy or procedure current between formal reviews. Minor or technical changes to a policy or procedure that do not affect its substance may be made by the responsible officer without requiring approval from the approving body. Examples include updating staff names, contact details, or making technical adjustments required by legislation or guidance that do not alter how the policy or procedure works. If a proposed change is substantial and does not qualify as a minor or technical drafting amendment, the revised policy or procedure must be submitted to the next available meeting of the approving body for consideration and approval.