



LIONHEART
EDUCATIONAL
TRUST

Charging & Remissions Policy

**This policy applies to all schools within
the Lionheart Educational Trust**

Approved by the Trust

July 2023-25

1. Aims

This policy aims to ensure robust, clear processes in place for charging and remissions, and clearly set out the types of activity that can be charged for and when charges will be made.

2. Legislation and guidance

This policy is based on Department for Education (DfE) Guidance [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.

Most activities planned to take place “mainly out of School time” as defined in section 107 of the Education Reform Act 1988 attracts a charge, which is the full cost of all aspects of the activity. Board and lodging on residential trips are included in this section.

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

- The Deputy CEO is responsible for approving and reviewing this policy.
- The Principal of each school is responsible for ensuring the details regarding charging and remissions for their particular school is in line with practice and is approved by them.
- The Principal is responsible for ensuring staff are familiar with the Charging and Remissions Policy and that it is being applied consistently.
- Staff are responsible for:
 - Implementing the Charging and Remissions Policy consistently
 - Notifying the Principal of any specific circumstances which they are unsure about or where they are not certain if the policy applies
- The Executive Principal for the school is responsible for monitoring the implementation of this policy.
- The Finance Partner monitors charges and remissions and ensures these comply with this policy.
- Parents are asked to notify the senior leadership team of any concerns or queries regarding the Charging and Remissions Policy.

5. Where charges cannot be made

5.1. 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 student is being prepared for at the school
 - 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 the school
- Examination re-sit(s) if the student is being prepared for the re-sit(s) at the school.

5.2. Transport

- Transporting registered students to or from the school premises, where the local authority has a statutory obligation to provide transport. Costs for this are the responsibility of the local authority (Leicester or Leicestershire).
- Transporting registered students to other premises where the school or local authority has arranged for students to be educated
- Transport that enables a student to meet an examination requirement when they have been prepared for that examination at the school
- Transport provided in connection with an educational visit

5.3. Residential visits

- Education provided on any visit that takes place during school hour
- 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 student is being prepared for at the school
 - Religious education
 - Supply teachers to cover for those teachers who are absent from school accompanying students on a residential visit.

6. Where charges can be made

6.1. Education

- Any materials, books, instruments or equipment, where the child's parent wishes him or her to own them
- Optional extras (see section 6.2)
- Music and vocal tuition, in limited circumstances (see section 6.3) o Community facilities
- Examination re-sit(s) if the student is being prepared for the re-sit(s) at the school and the student fails, without good reason, to meet any examination requirement for a syllabus

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:

Education provided outside of school time that is not part of:

- The national curriculum
- A syllabus for a prescribed public examination that the student is being prepared for at the school
- Religious education

Examination entry fee(s) 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 to other premises where the local authority or school has arranged for the student to be provided with education)
- Board and lodging for a student on a residential visit
- Extended day services offered to students (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)

- 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 students will not be greater than the actual cost of providing the optional extra activity, divided equally by the number of students participating

Any charge will not include an element of subsidy for any other students 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 students who do not wish to participate

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

Non-returnable deposits may be required to cover initial payments and administration costs. The school will always endeavour to fill a child's place who cannot attend, wherein a full refund can be made, including the deposit amount.

7. Music tuition

Schools can charge for vocal or instrumental tuition provided either individually or to groups of students, provided that the tuition is provided at the request of the student's parent/carer. Where the tuition is not provided by a directly employed member of staff, charging is arranged externally to the school, directly between the parent(s) and supplier of lessons.

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

Where a child is eligible for free school meals or Pupil Premium, parents may apply to the school to request that a contribution might be made towards the costs.

Charges cannot be made:

- If the teaching is an essential part of the national curriculum
- For a student who is looked after by a local authority

8. Residential visits

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

9. 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 to fund activities during school hours which would not otherwise be possible.

Some activities for which the school may ask parents for voluntary contributions include e.g. school trips, visits, residential or sports activities.

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.

10. Activities we charge for

The school will charge for the following activities:

10.1. Books, Stationery, Printing and Equipment

- The school may charge for specific text books and revision guides required as part of the National Curriculum. Alternatively, students may have the opportunity to borrow books for study from the library.
- Most parents will want to buy their children their own stationery such as pens, pencils, calculators etc, however, children will have the option to buy such items within school.
- Parents/carers of students who lose, do not return or damage books, stationery or equipment are expected to pay for their replacement or repair.

10.2. Residential trips

Accommodation, travel and associated costs relating to residential trips will be charged.

10.3. Out of hours activities

Activities such as theatre visits, which take place out of school hours and are not provided as part of the syllabus for a prescribed public examination and are not required in order to fulfil statutory duties to the National Curriculum, will be charged to parents.

10.4. Examinations

The Principal has the delegated responsibility to decide whether students are entered for particular examinations

The Principal has the authority to charge for examination entries in certain circumstances. Non-attendance (without reasonable reason) or resits of prescribed public examinations may be charged

The Principal is authorised to request payment for wasted examination fees.

10.5. Non-curriculum teaching & examination

The cost of entering a student for a public examination not prescribed in regulations and for preparing the student for such an examination outside academy hours (eg, at an evening class) may be charged.

10.6. Curriculum materials - Parents of students who are on practical courses (eg, Food Technology, Design, etc) will be asked to make a contribution to their materials used, but where appropriate will be able to take the end product home.

10.7. In-School activities - The cost of activities, including day trips within the school day, may be met by parents' voluntary contributions. The school will have to collect voluntary contributions towards a trip in advance of the trip so that if the sum collected is insufficient to cover the cost of the trip it can be cancelled and the money returned without financial loss. Pupils will never be treated differently whether or not their parents have made any such payment

10.8. Music tuition - The Principal is authorised to charge for music tuition outside normal classroom activities, when permitted

10.9. Clothing - A charge will be made for the compulsory uniform. A charge may also be made for specific clothing where a student wishes to purchase i.e., PE kits

10.10. Loss or damage to school property – Parents/carers of a student who damages or loses any item of school property or equipment including, for example, windows or computer software, are liable for the cost of repair or replacement

10.11. Additional voluntary charges - Additional charges may apply for activities you or your child voluntarily participates in, such as the annual prom tickets, photographs, show attendance and year books

10.12. Additional information - All charges made will be at cost to the school and in all instances value for money will be sought. For students in receipt of free school meals, some

of the costs above may be funded by the school, at their discretion, such as residential visits and/or compulsory uniform.

11. Remissions

11.1. 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 Principal and will depend on the activity in question

12. Financial Hardship

Any parent or guardian for whom this may apply should contact the Head of School and their case will be reviewed sympathetically within the constraints of the school budget and general funds.

At the Executive Headteacher's or Head of School's discretion:

- The school will pay a contribution towards the cost of a residential visit of any child who qualifies for free school meals or Pupil Premium. The parents will be informed of this at the time that parental consents for the trip are being requested. Parents may then apply to the school for the contribution.
- If parents have more than one child attending a residential visit and they do not qualify for free school meals or Pupil Premium, the school may make a contribution towards the cost of the second child. Parents should apply to the school for this contribution.
- The school will pay a contribution towards day trips or other activities for a child who qualifies for free school meals or Pupil Premium,
- Where the family is struggling financially but is not eligible for free school meals or Pupil Premium, a request for a contribution towards costs will be considered sympathetically if a parent makes a request to the school.

Parents should be encouraged to approach the school for support.

13. Clubs run by staff

Some clubs are run by school staff and not all of these attract a charge. Where the club uses expensive materials or involves additional adults there may be a charge but this will be made clear before children apply to join.

14. Clubs run by external groups and before and after care

Clubs run by external groups, including before and after school provision, will involve a charge made by the club itself.

Where children are eligible for free school meals or Pupil Premium, parents may ask the school to consider making a contribution towards the cost of these activities.

15. Refunds

In the event of a child being unable to take part in a school activity for which a charge or voluntary contribution is levied, or the activity is cancelled, refunds will be made whenever possible minus unrecoverable charges incurred by the school.

Procedures for refunds for residential visits will depend upon the details of the insurance policy applying and will be notified to parents in advance of the trip.

Insurance and coach monies are not usually refunded.

Additional information regarding charges and remissions in Mercia Academy

Remissions for residential visits – Students who are in receipt of free school meals can use their allocated £100 to pay towards the cost of board and lodging for residential visits.

All students will receive a copy and print allowance that is deemed sufficient for their studies. A minimal charge may be required for all copying and printing over and above their individual allowance.

Pupils who attract Pupil Premium funding may use their personal allowance to pay all or some of the cost for uniform items.

Peripatetic Music Lessons: 90% of the lessons will be charged to parents to enable the Academy to support as many pupils as possible. The Academy will pay the balance of the lessons dependent on commitment and attendance.

Pupils who attract Pupil Premium funding will get this provision paid for by the academy, if approved by the Pupil Premium Co-ordinator.

Duke of Edinburgh Award: Pupils who attract Pupil Premium funding will get this provision paid for by the academy, if approved by the Pupil Premium Co-ordinator.

The school operates a scheme allowing parents to pay for ingredients for food lessons and the school then buys the ingredients in bulk for convenience. This is charged at cost to parents who opt into the scheme.