



# Our Lady & St. Joseph's Catholic Primary School

## Charging & Remissions Policy



**Cluster Executive Headteacher:** Mr David Miller

**Chair of Governors:** Mr David Low

**Date:** September 2025

**Date for Review:** September 2026

*Living, loving and learning together with our eyes focused on Jesus*

## **Charging & Remissions Policy**

This Charging and Remissions Policy complies with statutory requirements, has regard to the Local Authority's Policy Statements on charging and is reviewed on a bi-annual basis. The education we provide at Our Lady & St. Joseph's, during normal school hours, is at no charge at all to pupils. We do not charge for any activity undertaken as part of the National Curriculum.

### **Legal framework**

This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:

- Education Act 1996
- 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
- ESFA (2022) 'Academy trust handbook 2022'

This policy operates in conjunction with the following school/Trust policies:

- Complaints Procedures Policy
- Debt Recovery Policy
- Freedom of Information Policy
- Freedom of Information Publication Scheme
- Finance Policy

### **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 additional tuition (e.g. school-led tuition)
- 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 or lease them
- Residential experiences
- Optional extras
- After-school activities
- Peripatetic music tuition
- Certain early years provision
- The use of community facilities and other commercial activities
- Provision of information within the scope of freedom of information

The school will make it clear that, in the following circumstances, it will propose to remit (wholly or partly) any charge which would otherwise be payable to the school:

- For pre-booked trips and activities in cases where the school has cancelled due to a foreseen circumstance.

### **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 RE
- Examination entry fees where the pupil has not been prepared for the examinations at the school or by school staff (e.g. ABRSM examinations for music).
- 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/wrap-around care).

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.

### **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 will be 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.**

### **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.

### **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 governing board or LA has arranged for pupils to be educated.
- Transporting pupils to meet an examination requirement when they have been prepared for the examination at the school.

### **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 will be deemed to take place during school hours. Whatever the start and finish times of the school day, regulations require that the school day is divided into two sessions. School hours will 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 will be 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, although we may ask for a voluntary contribution.

### **Residential visits**

The school will not charge for:

- 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.
- Supply teachers to cover for teachers accompanying pupils on visits.

For those in receipt of pupil premium, school will seek to enable the child to participate on the visit if the parent is in receipt of one of the below:

- Income Support
- Income-based Jobseeker's Allowance

*Living, loving and learning together with our eyes focused on Jesus*

- 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)

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.

### **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.

### **Remissions**

The school will set aside a fund to enable parents in financial difficulty to send their children on visits and activities. The funding will be limited and there is no guarantee that all requests can be met. Assistance will be allocated on a need-by-need 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
- Working Tax Credit run on – paid for four weeks after they stop qualifying for Working Tax Credit.
- Universal Credit – (see link)

To request assistance, parents should contact the school office: [info@olsju@bwcet.com](mailto:info@olsju@bwcet.com)

### **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. 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 a pupil or their parents cancel the pupil's place on a trip, it will be 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 will have 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 will be 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.

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 will be able to do so via the Complaints Policy.

### **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.

### **Freedom of Information Policy and Publication Scheme**

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

### **Equality statement**

- The governors and staff are committed to providing the full range of opportunities for all pupils, regardless of gender, disability, ethnicity, social, cultural, or religious background. All pupils have access to the curriculum, and the right to a learning environment, which dispels ignorance, prejudice, or stereotyping.
- ★ This policy has been impact assessed by governors in order to ensure that it does not have an adverse effect on race, gender or disability equality.

### **Human Rights Act 1988**

- In revising the school's policy on Charging and Remission for School Activities, consideration has been given to the requirements of the Human Rights Act 1998.
- Any parent wishing to object to a decision taken by the Head Teacher relating to this policy would have the right to complain to the governing body of the school, in accordance with the Complaints Policy.

### **Monitoring and Reviewing**

This policy will be reviewed on an annual basis.

This policy will be reviewed by the LGC in September 2026.