

St Ralph Sherwin
Catholic Multi Academy Trust

Charging and Remissions Policy

Version 6
October 2026

One of three Catholic Multi Academy Trusts in the Diocese of Nottingham

Document Provenance

Title of policy:	Charging and Remissions Policy	
Author and policy owner in the Executive Team:	Chief Financial Officer	
Version number:	6	
Date approved:	14 October 2026	
Approved by:	Finance and Estates Committee	
Date of next review:	September 2028	
Document review and editorial updates:		
Version control	**Date**	**Key revisions included**
1	Extant	Previous Version
2	28/02/2022	Update from 2020 version
3	02/03/2022	Minor clerical updates
4	27/04/2023	Updated front cover
5	28/04/2026	Additional points added to enhance policy
6	14/10/2026	Updated reference to ATH

'If one of you is planning to build a tower, you sit down first and figure out what it will cost, to see if you have enough money to finish the job.' Luke 14:28

1. Introduction and Purpose

1.1. The St Ralph Sherwin Catholic Multi Academy Trust (The Trust) Board is required to set a policy to provide guidance to academies on the circumstances in which the costs of activities organised by an academy should be funded from academy funding, charged to pupil's parents/guardians and the circumstances under which such costs might be remitted (reimbursed).

1.2. The intention of this policy is to set out the framework in which the Finance Team will manage this across the Trust to ensure that the Board's objectives and compliance with the relevant legislation is achieved.

1.3. This policy also reflects the financial governance expectations set out in the Academy Trust handbook (ATH 2025), particularly in relation to transparency, value for money, and equitable access for all pupils.

2. Objectives

2.1. The objectives of this policy are to:

- set out the principles on charging and remission for academy activities and visits;
- clarify where academies will charge/where voluntary contributions may be requested;
- to explain circumstances when academies propose to remit (wholly or partly) any charge which would otherwise be payable; and
- to set out how parents/guardians who are in receipt of the free school meal qualifying benefits will receive financial support towards the costs of activities and visits.
- ensure that charging decisions are transparent, equitable and consistent with the Trust's commitment to inclusion, value for money and support for disadvantaged pupils.

3. Scope and responsibilities

3.1. This policy is owned by The Trust's Finance and Estates Committee and will be adopted by each academy but will be implemented by the Chief Financial Officer across the Trust on a day-to-day basis.

3.2. This policy applies to activities and visits arranged by or delivered by any academy within the Trust, or by The Trust itself.

3.3. The Trust is required by Law to have a statement of general policy on charging and remissions that takes account of each type of activity that can be charged for and explains when charges will be made and when charges will be remitted. This policy has been drawn up in accordance with Sections 449-462 of the Education Act 1996 (The Act) and Regulations 1999: SI 1999/2255 which sets out the law on charging for school activities. The Act applies to academies through requirements of the Funding Agreement.

3.4. The Trust sets this general policy, and each academy will provide specific information in Appendix 1 of the activities and visits where charges and remissions will apply.

3.5. No charges can be made unless the academy has drawn up a policy for that purpose, and a remissions policy.

3.6. Policies and procedures implemented by the Trust are in place to control the organisation's exposure to risks identified within the risk register. All staff should take appropriate steps to make themselves be aware of this and all policies of the Trust and the procedures in place including any updates issued from time to time. Should staff have any queries relating to this or any other policy or procedure they should contact the Trust's Company Secretary who will provide guidance and where appropriate, training.

3.7. Each academy must ensure that information about charges, voluntary contributions and remissions is communicated to parents/guardians clearly, in advance, and in accessible formats.

4. Legislation and Regulation

4.1. This policy is written in accordance with:

- Sections 449 – 462 of the Education Act 1996
- School Admissions Code 2014
- The Trust's Funding Agreement

4.2. The DfE website includes a section - *Charging for School Activities May 2018* – which includes useful background to the establishment of this policy and can be found here - https://www.gov.uk/government/publications/charging-for-school-activities

4.3. This policy also aligns with the governance and financial management expectations set out in the Academy Trust Handbook (ATH 2025).

5. General Principles

5.1. Academies ***can*** charge for:

- any materials, books, instruments, or equipment, where the child's parents/guardians wish him/her to own them;
- music and vocal tuition, in limited circumstances (see para 6.2);
- certain early years provision[1];
- community facilities[2];
- extended services provision; and ▪ optional extras.

5.2. Academies ***cannot*** charge for:

- education provided during school hours;
- the supply of materials, books instruments or other equipment required for education provided during school hours
- education provided outside school hours if it is part of the national curriculum[3], or part of a syllabus for a prescribed public examination that the pupils is being prepared for at the academy, or part of 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 parents/guardians;
- entry for a prescribed public examination if the pupil has been prepared for it at the academy;
- examination re-sit(s) if the pupil is being prepared for the re-sits(s) at the academy[4]; ▪ admission to any academy;
- transporting registered pupils to or from the academy where the local authority has a statutory obligation to provide transport

[1] The Education (Charges for Early Years Provision) Regulations 2012

[2] The powers to provide community facilities are under s.27(1) of the Education Act

[3] The national curriculum is not restricted to learning outside the classroom linked to subjects – the national curriculum inclusion statement activities are also covered

[4] If a pupil fails, without good reason, to meet any exam requirement for a syllabus, the fee can be recovered from the pupil's parents/guardians.

- transporting registered pupils to alternative premises or provision where the academy has arranged for pupils to be educated
- transport that enables a pupil to meet an examination requirement when he/she has been prepared for that examination at the academy; and
- transport provided in connection with an educational visit during school hours

5.3. ***Support for*** parents/guardians: each academy will inform parents/guardians on low incomes and those in receipt of the benefits listed in para 14.1 of the support available to them when being asked for contributions towards the cost of school visits.

6. Voluntary Contributions

6.1. The Education Act specifies where charges can be made. Voluntary contributions may be requested for the benefit of the academy or any academy activity at any time. Voluntary contributions are helpful to the academy in allowing limited resources to support additional activities and visits. Each academy will make clear to parents/guardians whether an activity or visit can go ahead without voluntary contributions. Every child will have an equal opportunity to take part in an activity or visit regardless of the ability or willingness of parents/guardians to make a voluntary contribution. However, if an activity or visit cannot go ahead without voluntary contributions then the academy will make this clear in advance. If insufficient voluntary contributions are received the activity or visit will be cancelled.

7. Optional Extras

7.1. Charges may be made for some activities known as "optional extras" which are:

- Education provided outside of school hours 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 academy; or
    - part of religious education.

- examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the academy;
- transport (other than transport required to take the pupil to the academy or to other premises where the academy has arranged for the pupil to be provided with education);
- board and lodging for a pupil on a residential visit; or

- extended day services offered to pupils, such as breakfast clubs, after school clubs, supervised homework clubs.

7.2. In calculating the cost of optional extras the following can be included:

- any materials, books, instruments, or equipment provided in connection with it;
- the cost of buildings and accommodation;
- non-teaching staff costs;
- teaching staff engaged under a contract purely to provide an optional extra; and
- the cost for teaching staff employed to provide tuition in playing a musical instrument or vocal tuition where the tuition is an optional extra.

7.3. Participation in any optional extra will be based on choice and a willingness to meet the charges. Charges made per individual pupil will not exceed the actual cost of providing the optional extra.

8. School Hours

8.1. The Act distinguishes between education within school hours and education outside school hours in defining how and when charges can be made. School hours are when the school is in session, and do not include the break in the middle of the day.

9. Education during School Hours

9.1. Education provided during school hours will be free of charge. This includes materials, equipment, and transport provided in school hours by the Local Authority (LA) or by the academy to carry students between the academy and an activity. It also includes activities taking place during the school day, such as visiting theatre companies or day trips for students. Where an activity takes place partly during and partly outside school hours then the principles set out below will apply in determining the charging basis.

9.2. Musical Instrument Tuition during school hours is an exception and charges may be made for vocal or instrument tuition provided that the tuition is provided at the request of the pupil's parents/guardians and is not part of the national curriculum or the KS2 instrumental and vocal tuition programme. No charge may be made for a pupil who is looked after by a local authority. The charges for these lessons will be set down in a contract between the private music teacher and the parents/guardians. The academy itself will not charge for this activity.

9.3. ***Activities during school hours not run by the academy or the LA:*** When an organisation acting independently of the academy or LA arranges an activity to take place during school hours and parents/guardians want their children to join the activity, such organisations may charge parents/guardians. Parents/guardians must then ask the school to agree to their children being absent, just as they would if they wanted to take their children out of school for a family holiday.

9.4. ***Activities organised by a third party and approved by the academy*** that are educational or supervised by someone authorised by the academy, should be treated as if it were provided by the academy, and so no charge will be made to the parents/guardians, or students. Such an activity, if it takes place outside the school premises, is an 'approved educational activity' within the meaning of Regulation 4A (a) of the Education (Student Registration) Regulations 1995 (as amended).

10. Education outside school hours

10.1. The academy will charge parents/guardians for activities that take place outside school hours when these activities are not a necessary part of the National Curriculum or do not form part of the academy's basic curriculum for religious education. These are described as 'optional extras' under The Education Act 1996.

10.2. ***Residential Visits during school hours:*** the academy will charge for board and lodging. Other costs such as transport to and from the venue, activities and events held as part of the residential will be funded through voluntary contributions. The costs of providing supply cover for staff accompanying students on a residential will be funded through voluntary contributions.

10.3. ***Residential Visits outside of school time including in school holidays***: The academy will charge for board and lodging, transport costs and any activity or event held as part of the residential.

10.4. ***Non-residential activities partly during school hours:***

- If 50% or more of the time spent on the activity occurs during school hours, it is deemed to take place during school hours. Time spent on travel counts in this calculation if the travel itself occurs during school hours. Where less than 50% of the time spent on an activity falls during school hours, it is deemed to have taken place outside school hours.

10.5. Residential ***activities partly during school hours:***

- If the number of half day school sessions taken up by the visit is equal to or greater than 50% of the number of half days spent on the visit, it is deemed to have taken place during school hours (even if some of the activities take place late in the evening)

11. Other Charges

11.1. No charges will be made for entering students for public examinations that are set out in regulations and where the school has prepared that student through the syllabus. However, an examination entry fee may be charged to parents/guardians if:

- the examination is on the set list, but the student was not prepared for it at the school;
- the examination is not on the set list, but the school arranges for the student to take it;
- a student fails without good reason to complete the requirements of any public examination where the academy originally paid or agreed to pay the entry fee - this includes failure to attend for an examination without good reason.

11.2. Under Section 19 of the Transport Act 1985 and in accordance with the provisions of the Minibus and Other Section 19 Permit Buses Regulations 1987, the school may make a charge, where applicable for use of the school minibus. The Section 19 Bus Permit specifies that students of any school, college, university or other educational establishment and staff or other helpers accompanying them may be carried as passengers. A charge will be made on a per kilometre basis and the per kilometre rate will be determined by The Trust Chief Financial Officer annually.

11.3. If the Academy provides a bus service for home to school transport the charges for such a service will be set to recover the costs (including indirect costs) of providing the service and will determined by the number of students travelling on the bus. Parents/guardians will be informed of the charge at the start of each term and payment will be in advance for that term.

11.4. The academy will from time to time allow other groups to use academy premises. Charges for use of school premises are set at the start of each financial year.

12. Penalty Charges

12.1. The academy in collaboration with the Local Authority or Police will issue Penalty

Notices for non-attendance at school. The circumstances in which Penalty Notices will be issued are set out in the school's Attendance Policy and the amount of the Penalty Charge will be as applicable at the time of issue.

12.2. Where a student has lost or caused damage to property or equipment belonging to the school or to another student through deliberate misuse or vandalism then the school will charge parents/guardians for repairing or replacing the equipment. In collaboration with the school transport providers, the school will also charge parents/guardians for any wilful damage caused to school buses by students.

13. Remission of Charges

13.1. Parents/guardians, or the young person themselves, who are in receipt of any of the following benefits (the eligibility criteria for free school meals) will be exempt from paying the cost of board and lodging for residential activities taking place during school hours:

- 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 you're 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 4 weeks after you stop qualifying for Working Tax Credit
- 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)

13.2. Children who get paid these benefits directly, instead of through parents/guardians will also qualify.

13.3. You may also qualify if you receive one of the above and your child is both:

- younger than the compulsory age for starting school; or
- in full-time education

13.4. Letters will be sent to parents/guardians at the planning stage of a visit to make it clear that those qualifying under the above will be exempt from the charges relating to board and lodgings for residential activities taking place during school hours.

13.5. The academy will meet the costs of board and lodgings for those children exempt. When trips or activities taking place during school time are oversubscribed then the process for selecting children to take part will be fair and open and those who are exempt from charges will not be disadvantaged. Ability to pay will not be a factor in selecting children to take part.

13.6. Charges to parents/guardians will not exceed the actual cost of providing the activity and will not include additional amounts to subsidise the event or other students. However, voluntary contributions will be sought at any time towards the costs of the activity, and these will be used to ensure that the activity can proceed.

13.7. In the event of excess charges being made, parents/guardians will be refunded. However, voluntary contributions will be retained by the school.

13.8. The process for applying for financial support will be confidential, fair and timely. No pupil will be identified publicly as receiving remission.

13.9. Decisions on discretionary financial support (beyond statutory remissions) will be made by the Headteacher or designated senior leader, following Trust guidance, and recorded for audit purposes.

14. Academy-specific items

14.1. Appendix 1 provides an illustration as to how an academy will charge for the range of activities typically taking place during a school year.

14.2. In addition, as part of the distinctive Catholic ethos of the school, the Local Governing Body wishes to make available to every child the opportunity to take part in at least one Briars Retreat during their time at school. Although not obliged to do so the school may offer support to families towards meeting the costs of these retreats. parents/guardians experiencing financial difficulties not already covered under the remissions section of this policy will be advised to contact the academy, who will review the circumstances. Decisions on financial support will be made on a case-by-case basis.

14.3. Where appropriate, academies may use Pupil Premium funding to support access to activities for eligible pupils, in line with their published Pupil Premium Strategy.

15. Monitoring, Compliance and Review

15.1. The Finance and Estates Committee has overall responsibility for monitoring and reviewing the impact of this policy and making recommendations for updates and revisions as needed, or when there are changes in regulations and legislation to which the Trust must respond.

15.2. The Finance and Estates Committee will review and sign off this policy every 3 years unless there are regulatory and legislative changes which require the policy to be updated earlier.

15.3. The Finance and Estates Committee will ensure that charging decisions demonstrate value for money and comply with the Academy Trust Handbook.

15.4. Internal audit processes may periodically review charging and remissions practices to ensure consistency and compliance across the Trust.

15.5. Debt recovery and any debt write-off processes are governed by the Trust's Financial Regulations. Where the Trust is subject to a Notice to Improve, no debt may be written off without DfE approval.

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Appendix 1: Charging and Remissions for Activities and Visits

Visit/Activity[i]	Cost Type	Charge	Voluntary Contribution	Remission of charges where applicable
Residential activities (during school week/hours)	Board & Lodging	YES	n/a	YES
	Transport	NO	YES	n/a
	Activities	NO	YES	n/a
	Indirect costs	NO	YES	n/a
Residential activities (outside school week/hours)	Board & Lodging	YES	n/a	NO
	Transport	YES	n/a	NO
	Activities	YES	n/a	NO
	Indirect costs	YES	n/a	NO
Non-residential visits (during school hours)	Entry Fees	NO	YES	n/a
	Transport	NO	YES	n/a
	Activities	NO	YES	n/a
	Indirect costs	NO	YES	n/a
Non-residential trips or other visits outside or largely outside school hours not part of the national curriculum	Entry Fees	YES	n/a	NO
	Transport	YES	n/a	NO
	Activities	YES	n/a	NO
	Indirect costs	YES	n/a	NO
Non-residential trips or other visits outside or largely outside school hours as part of the national curriculum	Entry Fees	NO	YES	n/a
	Transport	NO	YES	n/a
	Activities	NO	YES	n/a
	Indirect costs	NO	YES	n/a
Non-uniform, fast day and fund raising	Wearing nonuniform	NO	YES	n/a
	Fast Day meal	YES	n/a	YES
Sports Coaches/activities during school day/week	Aerobics, Zumba, rugby	NO	YES	n/a

[i] Academies may choose certain activities outside of the school day which it considers to be important for all pupils to attend – financial support may be offered to families on low incomes resulting in a remission or part remission of charges – this is at the discretion of the Academy

[ii] Mandated in legislation. An academy may choose to use funds such as Pupil Premium to subsidise activities as part of the Pupil Premium Strategy – this is at the discretion of the Academy