

Charging and Remissions Policy



Approved by Governors Date: STILL TO BE RATIFIED
Review date: September 2027

1. Aims

At Phoenix Primary School, we believe all pupils should have equal opportunity to benefit from school activities, both curricular and extra-curricular, regardless of their family's financial circumstances.

This policy aims to:

- Set out **when the school will and will not charge** for activities and school provision.
- Explain **when voluntary contributions** will be requested.
- Set out the **circumstances in which charges will be remitted** (wholly or partly).
- Ensure compliance with relevant legislation and DfE guidance.

2. Legislation and guidance

This policy is based on:

- **Sections 449–462 of the Education Act 1996** (charging for school activities). childlawadvice.org.uk
- DfE guidance "**Charging for school activities**" (May 2018). GOV.UK+1
- DfE guidance "**What maintained schools must or should publish online**". GOV.UK

The governing board of Phoenix Primary School is required to publish a **charging policy** and a **remissions policy** setting out when it will charge for school activities and when it will cancel or reduce those charges. GOV.UK

3. Definitions

For the purpose of this policy:

- **Charge:** a fee payable for a specific activity or provision.
- **Remission:** the cancellation or reduction of a charge which would normally be payable.
- **School hours:** those hours during which the school is in session, not including break or lunchtime.
- **Optional extra:** education or activities that take place wholly or mainly outside school hours and are not part of:
 - the national curriculum;
 - a syllabus for a prescribed public examination;
 - statutory religious education. GOV.UK

4. Roles and responsibilities

4.1 Governing Board

The governing board is responsible for:

- Approving this Charging and Remissions Policy.
- Ensuring the policy complies with legislation and DfE guidance.
- Monitoring the implementation and impact of the policy.

4.2 Headteacher

The headteacher is responsible for:

- Ensuring all staff are aware of, and follow, this policy.
- Making decisions on charging and remissions within the framework set out here.
- Ensuring information for parents is clear, transparent and compliant.

4.3 Staff

Staff are responsible for:

- Following this policy when planning activities that may involve charges or voluntary contributions.
- Giving accurate costings for activities, and passing these to the headteacher as required.
- Signposting parents and carers to the office/headteacher if they have financial concerns.

4.4 Parents and carers

Parents and carers are expected to:

- Support the school by contributing voluntarily where they are able.
- Contact the school promptly if they may experience difficulty in paying for an activity or optional extra.

5. Where charges cannot be made

In line with legislation and DfE guidance, the school **must not** charge for: [GOV.UK](https://www.gov.uk)

5.1 Education

- Admission to the school.
- Education provided **wholly or mainly during school hours** (including the materials, books, instruments or equipment needed for that education).
- Education provided **outside school hours** if it is:
 - part of the national curriculum;
 - part of a syllabus for a prescribed public examination for which the pupil is being prepared at the school;
 - part of statutory religious education.

5.2 Instrumental or vocal tuition

- Instrumental or vocal tuition that is required as part of:
 - the national curriculum; or
 - a syllabus for a prescribed public examination; or
 - statutory religious education.

5.3 Transport

- Transport between the pupil's home and school where the local authority has a statutory duty to provide it.
- Transport provided in school hours to carry pupils between the school and another place where education is to be provided (e.g. another school or sports facility) as part of the school's curriculum. [GOV.UK](#)

5.4 Residential visits (education costs)

- Education provided on any visit that takes place during school hours.
- Education provided on a residential visit if:
 - the visit is during school hours; or
 - the visit takes place outside school hours but is part of:
 - the national curriculum;
 - a syllabus for a prescribed public examination for which the pupil is being prepared at the school; or
 - statutory religious education. [GOV.UK](#)

6. Where charges can be made

The school **may** charge for the following, where appropriate and lawful:

6.1 Optional extras

Charges may be made for optional extras. These include:

- Education provided **wholly or mainly outside school hours** that is not:
 - part of the national curriculum;
 - part of a syllabus for a prescribed public examination; or
 - part of statutory religious education.
- After-school clubs and activities that meet the criteria above.
- Breakfast club and other wrap-around care.
- Extended day services (for example, supervised homework clubs) where these are not required as part of the curriculum.
- Board and lodging for residential trips (see 6.2 below).

- Transport (other than transport provided by the LA or school to meet statutory duties) that is:
 - not required to fulfil the school's statutory responsibilities; and
 - wholly or mainly outside of school hours.

When calculating the cost of optional extras, the school will ensure that: [GOV.UK+1](#)

- The **charge does not exceed the actual cost** of providing the optional extra divided equally by the number of pupils participating.
- The cost will only include:
 - staff costs (including teaching staff) engaged under a separate contract to provide the optional extra;
 - materials, books, instruments or equipment;
 - non-teaching staff costs;
 - the cost of accommodation, travel and insurance.
- The school **will not make a profit** from charges.
- The school will not charge a pupil's parents/carers more than the share that it would cost to provide the activity for that pupil, nor will it use payments from some parents to subsidise those who are unable to pay.

6.2 Residential visits – board and lodging

- The school may charge for **board and lodging** on residential visits, whether or not the visit takes place largely during school hours, **up to the actual cost** of providing board and lodging. [GOV.UK](#)
- Any pupils whose parents are in receipt of certain benefits may be entitled to **remission** (see Section 9).

6.3 Music tuition

The school may charge for:

- Individual or small-group instrumental/vocal tuition if:
 - it is provided at the request of parents; and
 - it is not essential to the national curriculum, a public examination syllabus, or statutory religious education. [GOV.UK](#)

Charges will not exceed the cost of the teacher for the relevant lesson and an appropriate share of the cost of sheet music or hire of instruments where applicable.

6.4 Materials, books, instruments or equipment

- The school may charge for, or seek voluntary contributions towards, the cost of materials, books, instruments or equipment **where parents have indicated that they wish to own the finished product** (for example, in Design and Technology or Art & Design). [GOV.UK](#)

6.5 Damage to property and breakages

The school may seek to recover:

- The cost of repairing or replacing property (school or third-party) lost, damaged or defaced where this is the result of a pupil's **deliberate or careless behaviour**.
- The cost will **not exceed the actual cost** of repair or replacement.

7. Voluntary contributions

- The school may, from time to time, ask parents/carers for **voluntary contributions** towards the cost of:
 - educational visits and workshops;
 - in-school visitors/experiences;
 - transport for curriculum-related activities;
 - additional resources to enhance the curriculum. [GOV.UK+1](#)

When seeking voluntary contributions, the school will ensure that:

1. It is made clear in all communications that **there is no obligation to contribute**.
2. Pupils of parents/carers who are unable or unwilling to contribute **will not be treated differently or excluded** from the activity.
3. If an activity cannot go ahead without sufficient voluntary contributions, this will be made clear in advance, and the activity **may be cancelled** if insufficient funds are received.
4. Any contributions requested **will not exceed the actual cost** of the activity.

No pupil will be excluded from an activity because their parents are unwilling or unable to pay; however, where there are insufficient voluntary contributions and no alternative funding, the school reserves the right to cancel or amend the activity.

8. School meals

This policy does **not** cover charges for school meals, which are governed by separate legislation and local authority guidance. Information about eligibility for **free school meals** is available from the school office and via the local authority website.

9. Remissions (cancellation or reduction of charges)

9.1 Entitlement to statutory remissions

Where the school charges for board and lodging on a residential visit that is:

- part of the national curriculum; or

- part of a syllabus for a prescribed public examination for which the pupil is being prepared at the school; or
- part of statutory religious education,

the school **must** remit (i.e. fully cancel) the board and lodging charge for pupils whose parents are in receipt of any of the following benefits, as set out in DfE guidance: [GOV.UK+1](https://www.gov.uk/guidance/parental-benefits-that-qualify-for-board-and-lodging-remission)

- Income Support (IS)
- Income-based Jobseeker's Allowance (IBJSA)
- Income-related Employment and Support Allowance (ESA)
- Support under Part VI of the Immigration and Asylum Act 1999
- The guaranteed element of State Pension Credit
- Child Tax Credit (provided the parent is **not** also entitled to Working Tax Credit) and has an annual gross income below the threshold set by HMRC
- Working Tax Credit "run-on" – paid for 4 weeks after a parent stops qualifying for Working Tax Credit
- Universal Credit, where the household's net earned income does not exceed the threshold specified in the latest DfE guidance

The school will follow the **most up-to-date DfE thresholds and benefit criteria** when applying statutory remissions.

9.2 Discretionary remissions and support

In addition, Phoenix Primary School may offer **discretionary remission or financial support** for other charges, including:

- Optional extras (such as after-school clubs, non-residential visits and music tuition);
- Board and lodging on non-curricular residential visits;
- Other chargeable activities where non-participation would significantly disadvantage a pupil.

Priority may be given to:

- Pupils eligible for **Free School Meals (FSM)**;
- Pupils in receipt of **Pupil Premium funding**;
- **Looked-after children (LAC)** and **Previously Looked-After Children (PLAC)**;
- Families experiencing temporary hardship or exceptional circumstances.

Applications for discretionary remission will be:

- Considered **confidentially** by the headteacher (and/or a nominated senior leader).
- Assessed on a case-by-case basis, taking into account the pupil's circumstances, the educational value of the activity and the availability of school funds.

Parents and carers are encouraged to contact the headteacher or school office in confidence if they believe they may be eligible for assistance.

10. Communication with parents/carers

The school will ensure that:

- Information about this policy is published on the school website and is available from the school office. [GOV.UK](https://www.gov.uk)
- Letters and communications about specific activities clearly state:
 - whether the activity is chargeable, optional, or funded by voluntary contributions;
 - the total cost per pupil and what it covers;
 - the nature of any available remissions or support;
 - the consequences if insufficient contributions are received (e.g. cancellation).

11. Monitoring and review

- The governing board will review this policy **at least every two years**, or earlier if required by changes in legislation, DfE guidance or local authority policy.
- The headteacher will report to the governing board on:
 - the range of activities offered;
 - uptake by different pupil groups;
 - the impact of charges and remissions on equal access and participation.

Any proposed changes to this policy will be brought to the governing board for approval.