

POLICY

POLICY TYPE

MAT Policy to adopted in full across all schools	✓
LGC Policy to be reviewed and approved locally	



*"called by Christ
to be agents of change
and apostles of hope"*

Approval Date:	2025/26 – AUTUMN TERM
Review Date:	2026/27 – SPRING TERM

ST OSCAR ROMERO CATHOLIC ACADEMY TRUST

CHARGING & REMISSIONS POLICY

"St Oscar Romero Catholic Academy Trust is committed to providing excellence in education rooted in the Gospel values of Christ. We nurture the whole person - spiritually, academically, socially, and morally - empowering our students to recognise their God-given dignity, develop their unique talents, and become agents of positive change. Through the principles of Catholic social teaching, we foster communities of justice, solidarity, and compassion where all are welcomed, valued, and inspired to serve the common good."

1. Aims

- 1.1. In implementing this policy, the Trust is guided by Catholic Social Teaching, particularly the principles of human dignity, justice, and the preferential option for the poor, ensuring that no pupil is excluded from educational or enrichment opportunities on the basis of financial hardship.
- 1.2. The Trust recognises the valuable contribution that the wide range of additional activities, including trips, clubs and residential experiences can make towards pupils' education. The Trust aims to promote and provide such activities both as part of a broad and balanced curriculum for the pupils of the schools and as additional optional activities.
- 1.3. In overview, no charges will be made for Education provided during school hours or outside school hours if it is part of the National Curriculum or part of the school's basic curriculum for religious education. However, whenever activities, including educational visits are undertaken, and the individual school is unable to fully fund such activities, it is intended that voluntary contributions will be invited from parents/carers.
- 1.4. This policy aims to set out
 - robust, clear processes in place for charging and remissions
 - the types of activity that can be charged for and when charges will be made

2. Legislation and guidance

- 2.1. This policy is based on advice from the Department for Education (DfE) on 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.
- 2.2. This policy complies with our funding agreement and articles of association.

3. Roles and responsibilities

- 3.1. In exercising this responsibility, Headteachers will apply the principles of Subsidiarity and Participation, ensuring that decisions about charging and remissions are made at the most appropriate level, informed by dialogue with families, and with due regard for the dignity of every person and the common good of the whole school community.
- 3.2. Headteachers: For the purposes of this document, 'Headteacher' includes Executive Head, Headteacher, Head of School and Principal. The Headteacher is responsible for ensuring staff are familiar with the charging and remissions policy, and that it is applied consistently.
- 3.3. Staff are responsible for:
 - a) Implementing the charging and remissions policy consistently
 - b) Notifying the Headteacher 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.

3.4. Parents/Carers

Parents/Carers are invited to notify staff or the Headteacher of any concerns or queries regarding the charging and remissions policy.

4. Activities we cannot charge for

All decisions relating to charging are made within statutory guidance and in the light of Catholic Social Teaching, particularly Stewardship and Distributive Justice, ensuring that resources are managed responsibly and shared fairly.

We cannot charge for:

4.1. Admissions Applications

4.2. Education

- a) provided during school hours (including the supply of any materials, books, instruments or other equipment).
- b) provided outside school hours if it is part of the national curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education.

4.3. Transport

- a) provided in connection with an educational visit which is part of the national curriculum. Costs can only be recovered as a voluntary contribution.
- b) for registered pupils to or from the school premises, where the local authority has a statutory obligation to provide transport
- c) for registered pupils to other premises where the Local Governing Committee or local authority has arranged for pupils to be educated
- d) that enables a pupil to meet an examination requirement when he or she has been prepared for that examination at the school

4.4. Exams

- a) entry for a prescribed public examination, if the pupil has been prepared for it at the school
- e) re-sit(s) if the pupil is being prepared for the re-sit(s) at the school

4.5. Supply teachers to cover for those teachers who are absent from school accompanying pupils on a necessary educational visit, whether residential or not.

5. Activities we can charge for

Charges may be made for other activities known as 'optional extras'. Where an optional extra is being provided, a charge may be made for providing materials, books, instruments, or equipment as follows:

- 5.1. Any materials, books, instruments, or equipment, where the child's parent/carer wishes him/her to own them;
- 5.2. Materials used in practical subjects and project assignments provided parents/carers have agreed in advance that they or the pupil wish to keep the finished product e.g. ingredients or materials.
- 5.3. Music and vocal tuition; payments will normally be made directly to the peripatetic teacher through a private arrangement between the parent/carer and teacher.
- 5.4. Lost library or text books. The fee for a non-returned item is equivalent to the item's replacement price.

- 5.5. Schools may provide pupil planners to help pupils plan their work, manage their time, record their achievements and set targets for improvement. A voluntary charge may be requested to cover the cost price of these items. A mandatory charge will be applied for any subsequent planner that is required due to loss or damage by the pupil.
- 5.6. use of community facilities such as sports pitches and halls.
- 5.7. additional nursery sessions over and above the free entitlement provided by the school.
- 5.8. education provided **outside** of school time 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 school; or
 - part of religious education.
- 5.9. examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school;
- 5.10. transport (other than transport that is required to take the pupil to school or to other premises where the Local Governing Committee has arranged for the pupil to be provided with education);
- 5.11. the cost of board and lodging for residential trips, even when taking place largely during school time.
- 5.12. extended day services offered to pupils (for example breakfast club, after-school clubs). Individual Local Governing Committee may determine if Remissions will apply for parents in receipt of Eligible Benefits and must publish this information on their websites. Charges will be reviewed in June each year for the following academic year, and may be subject to revision provided one month's notice is given.

6. Types of Visits

Visits fall under three categories:

Type 1) Necessary Educational Visits	forms a part of National Curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or as part of religious education; May be within or outside school hours. It should be remembered that education provided during school hours must be free.	Charges may not be made but Voluntary Contributions may be requested.
Type 2) Optional Educational Visit	a visit which will enhance a pupil's education but is not a necessary part of the national curriculum or prescribed public examination that a pupil is being prepared for. The visit may be outside school hours.	Charge may be made as an Optional Extra .
Type 3) Optional School Trip	is organised for the enjoyment and expanding cultural/sporting horizons of children.	Charge may be made as an Optional Extra

7. Calculating the Cost of Optional Extras

- 7.1. In calculating the cost of optional extras an amount may be included in relation to:
- a) any materials, books, instruments, or equipment provided in connection with the optional extra;
 - b) the cost of buildings and accommodation;
 - c) transport provided in school hours to carry pupils between the school and an activity
 - d) support staff;
 - e) teaching staff engaged under contracts for services purely to provide an optional extra, this includes supply teachers engaged specifically to provide the optional extra; Note: If part of the activity takes place during school hours, no charge can be made for alternative provision for non-participants –for example, a school cannot charge for supply teachers needed to cover teachers on a residential trip.
 - f) 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.
- 7.2. For regular activities such as wrap around care, the charges for each activity will be determined by the Local Governing Committee and reviewed in June each year. Parents/Carers must be informed of the charges for the coming year.
- 7.3. Parental agreement is necessary for the provision of an optional extra which is to be charged for.
- 7.4. 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. The value of the voluntary contribution may not include a surcharge to cover for those parents who do not pay
- 7.5. In cases where a 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.
- 7.6. Any charge must 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.
- 7.7. If part of the activity takes place during school hours, no charge can be made for alternative provision for non-participants - for example, a school cannot charge for supply teachers needed to cover teachers on a residential trip.

8. Voluntary contributions

- 8.1. Requests for voluntary contributions will be made in a spirit of Solidarity and Participation, recognising that families contribute in different ways. No individual or group will be disadvantaged as a result of financial circumstances, and all members of the community will be treated with dignity and respect.
- 8.2. Although schools cannot charge for school time activities, voluntary contributions may be sought from parents/carers for activities that supplement the normal curriculum.
- 8.3. Requests to parents/carers for voluntary contributions will state that:
- a) there is no obligation to make a voluntary contribution;
 - b) pupils will not be excluded if parents'/carers' cannot or chose not to pay;
 - c) pupils of parents/carers who cannot contribute will not be treated any differently;
 - d) where there are not enough voluntary contributions to make the activity possible and

there is no way to make up the shortfall, the activity will be cancelled.

- 8.4. Any shortfall may be met from school fundraising, donations or allocated school budget e.g. Sport Premium.
- 8.5. Requests made for voluntary contributions must not include any element of subsidy for any other pupils wishing to participate in the activity whose parents/carers are unwilling or unable to pay the full charge.

9. Residential Trips

- 9.1. The School will charge parent/carers for board and lodging on residential visits as well as the full cost when a visit is deemed to be an 'optional extra'. For example, it:
 - a) falls wholly or mainly outside school hours, i.e. a skiing holiday during the school holidays is an optional extra.
 - b) does not form part of the National Curriculum or the statutory requirements for religious education;
 - c) is not part of a syllabus towards a Prescribed Public Examination

10. Remissions

- 10.1. Remissions are provided in accordance with Catholic Social Teaching, particularly Distributive Justice and the Preferential Option for the Poor, ensuring that those most in need are supported and that access to opportunities is equitable across the school community.
- 10.2. Schools may set aside a small fund to enable families in financial difficulty to send their children on visits/activities. Parent Teachers Associations' may also support school activities through fund raising. School funding is limited and there is no guarantee that all requests can be met. Assistance will be allocated on a needs basis, and if the full cost of the trip/activity cannot be met through assistance funding and voluntary contributions or allocated school budget, the trip/activity will be cancelled.
- 10.3. Individual schools may determine an allocation of Pupil Premium funding to support remissions for Parents/Carers in receipt of Eligible Benefits, which will be determined by the Headteacher. Any such remissions will be included in the statutory Pupil Premium report on each school's websites.

11. Breakages and Damage

- 11.1. Where a pupil's behaviour results in damage to school property or equipment, parents/carers may be asked to pay for the necessary repair or replacement. Each incident will be dealt with on its own merit and at the school's discretion.
- 11.2. This does not in any way detract from the teaching staff's duty to brief pupils thoroughly and to manage a calm and safe working environment for the pupils.

12. Owed money and Debt Recovery

- 12.1. While the Trust has a responsibility to recover monies owed, it will do so in a manner consistent with Human Dignity and Promoting Peace, exercising proportionality, sensitivity, and respect for individual family circumstances wherever possible.

- 12.2. Where the school incurs material additional costs in recovering an outstanding debt then the school may decide to seek to recover such costs from the debtor. The debtor will be formally advised in writing that they will be required to pay the additional costs incurred by the school in recovering the debt.
- 12.3. If a response or payment is not received within a reasonable time, the Trust may seek to refer the matter to a Debt Recovery Agency who will take action to recover the funds. All costs will be claimed against the parent/carer. The agency's commission may be as high as 20% and additional set up and collection fees will also be claimed.

13. Refunds

- 13.1. If after completion of a trip or journey a surplus exists, the money will be applied as follows:
 - a) If the surplus is greater than 5% of the contribution per head, subject to a minimum of £10, then a refund of the full amount of the surplus will be offered to parents/carers.
 - b) If the surplus is less than 5% of the contribution per head or less than £10, the surplus will be placed in the school fund.

This policy reflects the Trust's commitment to living out Catholic Social Teaching in practical decision-making, ensuring that financial arrangements promote justice, inclusion, peace, and the common good of the whole school community.