

HOLLINGWORTH LEARNING TRUST

CHARGING & REMISSIONS POLICY

POLICY INFORMATION

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Created by:	J Hawkrigg
Approved by:	Finance, Audit & Risk Committee
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AMBITIOUS



POSITIVE



RESILIENT



REFLECTIVE



PRINCIPLED

VERSION INFORMATION

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1. Aims

Hollingworth Learning Trust's mission is to make a positive difference to the lives of our children, providing the very best education in an environment that supports, values, and recognises our people. To deliver this mission, Hollingworth Learning Trust aims to

- Have robust, clear processes in place for charging and remissions.
- Clearly set out the types of activity that can be charged for and when charges will and will not be made.
- Offer a range of activities and visits whilst minimising the financial barriers that may prevent some pupils from taking full advantage of these opportunities.

This policy sets out the approach to charging and remissions within Hollingworth Learning Trust. This policy must be followed by all schools within the Trust family.

This is a non-contractual policy; the policy applies to all staff.

Equality and Diversity Policy Statement:

Hollingworth Learning Trust are committed to meeting our obligations under the Public Sector Equality Duty (PSED) and within our charging and remissions processes we actively;

- promote equality, diversity and inclusion;
- aim to eliminate discrimination;

Trust Vision and Values – Charging and remissions

To support the vision of making a positive difference to the lives of our children, the Trust is committed to ensuring that we have clear processes for charging and remissions, and that no pupils are prevented from participating in school activities due to financial barriers. This embodies the Trust core values:

AMBITIOUS:	We have high expectations for all of our children and staff. They deserve the best we can do.
POSITIVE:	We believe that people and schools can improve; we always believe this.
RESILIENT:	We make long term commitments to pupils, families, communities and schools. We never give up.
REFLECTIVE:	We constantly evaluate what we do in order to improve. We are never complacent.
PRINCIPLED:	We consistently promote equity, equality and challenge injustice. We always act in the best interests of our pupils.

2. Legislation and guidance

This policy is based on advice from the Department for Education (DfE) on [charging for school activities](#) and [the Education Act 1996](#), sections 449 to 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.

It is also based on guidance from the DfE on [statutory policies for schools and academy trusts](#).

This policy complies with our funding agreement and articles of association.

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

4.1 The Trust Board

The Trust Board has overall responsibility for approving the Charging and Remissions Policy, but can delegate this to a committee, an individual trustee or the CEO.

The Trust Board also has overall responsibility for monitoring the implementation of this policy.

Monitoring the implementation of this policy has been delegated to the Audit Committee.

4.2 Headteachers

The Headteacher is responsible for ensuring staff are familiar with the Charging and Remissions Policy, and that it is being applied consistently.

4.3 Staff

Staff are responsible for:

- Implementing the Charging and Remissions Policy consistently.
- Notifying the Headteacher of any specific circumstances which they are unsure about or where they are not certain if the policy applies.

The school will provide staff with appropriate training in relation to this policy and its implementation.

4.4 Parents

Parents are expected to notify staff or the Headteacher of any concerns or queries regarding the Charging and Remissions Policy.

5. Where charges cannot be made

Below we set out what we **cannot** charge for:

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 pupil is being prepared for at the school.
 - 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 parent.
- Entry for a prescribed public examination if the pupil has been prepared for it at the school.

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

5.2 Transport

- Transporting registered pupils to or from the school premises, where the local authority has a statutory obligation to provide transport.
- Transporting registered pupils to other premises, where the governing board or local authority has arranged for pupils to be educated.
- Transport that enables a pupil 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 hours.
- 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 pupil is being prepared for at the school.
 - Religious education.
 - Supply teachers, covering for teachers who are absent from school, accompanying pupils on a residential visit.

6. Where charges can be made

Below we set out what we **can** charge for:

6.1 Education

- Any materials, books, instruments, or equipment, where the child's parent/carer wishes him or her to own them.
- Optional extras (see section 6.2).
- Music and vocal tuition, in limited circumstances (see section 6.3).
- Certain early years provision.
- Community facilities.
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school **and** the pupil 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 pupil is being prepared for at the school.
 - Religious education.

- Examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school.
- Transport (other than transport that is required to take the pupil to school or to other premises where the local authority or governing 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 (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 cost, 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 pupils will not be greater than the actual cost of providing the optional extra activity, divided equally by the number of pupils participating.

Any charge will not include an element of subsidy for any other pupils who wish to take part in the activity but whose parents/carers 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 pupils who do not wish to participate.

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

6.3 Music Tuition

Schools can charge for vocal or instrumental tuition provided either individually or to groups of pupils, provided that the tuition is provided at the request of the pupil's parent/carer.

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

Charges cannot be made:

- if the teaching is an essential part of the national curriculum.
- if the teaching is provided under the first access to the Key Stage 2 instrumental and vocal tuition program.
- for a pupil who is looked after by a local authority.

6.4 Residential Visits

- We can charge for board and lodging on residential visits, but the charge must not exceed the actual cost.
- For residential trips which are not essential to the national curriculum, statutory RE or in preparation for prescribed examinations.
 - If the amount of school time on the trip is less than half of the total time of the trip, a charge will be levied up to the full cost of the trip.
 - If the amount of school time on the trip is half or more of the total time of the trip, a charge will be levied for board and lodging.

- Any trip deemed to be a reward trip, or not essential to the curriculum, has to be paid for in full, prior to the trip taking place.
- Deposits collected for visits are done so according to the tour operator or booking agencies' regulations. Therefore, they are non-refundable in most cases.

If a pupil decides not to participate in a residential visit, cancellation will only be accepted in writing from the parent/carer, and the cancellation charges to the tour operator or booking agency will apply.

If a pupil is removed from a residential visit due to serious behavioural concerns raised by the school, any cancellation charges to the tour operator or booking agency will apply.

The school will attempt to fill cancelled places and obtain refunds, but this is not guaranteed.

7. Voluntary Contributions

As an exception to the requirements set out in section 5 of this policy, the school can ask for voluntary contributions from parents to fund activities which would not otherwise be possible.

Some activities for which the school may ask parents for voluntary contributions include:

- School trips.
- Sporting activities.
- Music events.

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.

8. Activities we charge for

For regular activities, the charges for each activity will be determined by the Local Governing Board and reviewed in July each year. Parents/carers will be informed of the charges for the coming year in September each year.

9. Damage/Loss to Property

9.1 School

A charge will be levied in respect of willful damage, neglect, or loss of school property (including premises, furniture, equipment, books or materials); the charge to be the cost of replacement or repair, or such lower cost as the Headteacher may decide.

9.2. Third Party

A charge will be levied in respect of willful damage, neglect, or loss of property (including premises, furniture, equipment, books or materials) belonging to a third party, where the cost has been recharged to the school. The charge to be the cost of replacement or repair, or such lower cost as the Headteacher may decide.

9.3. Debt Recovery

Charges are recoverable from parents/carers and can be pursued as a civil debt.

10. Remissions

In some circumstances, the school may not charge for items or activities set out sections 6 and 8 of this policy. This will be at the discretion of the Local Governing Board and will depend on the activity in question.

10.1 Remissions for residential visits

Parents who can prove they are in receipt of any of the following benefits will be exempt from paying the cost of board and lodging for residential visits:

- 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 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 - household income must be less than £7,400 a year (after tax and not including any benefits you get). From September 2026 all families on Universal Credit will be eligible, regardless of earnings.

Children of families who receive these payments are also entitled to free school meals.

11. Consistency of treatment and fairness

Hollingworth Learning Trust are committed to ensuring consistency of treatment and fairness. It will abide by all relevant equality legislation, including the duty to make reasonable adjustments where these are deemed either necessary or appropriate.

Hollingworth Learning Trust are aware of the guidance and provisions of the Equality Act 2010.

12. Monitoring arrangements

The Trust Senior Finance Manager monitors charges and remissions and ensures these comply with this policy.

This policy will be reviewed by the Trust Senior Finance Manager annually.

At every review, the policy will be approved by the CEO.

13. Links with other policies

This policy links to our policies on:

- School Trips & Visits Policies
- Trust Financial Regulations Policy