



# **Charging and Remissions Policy**

## Policy document provenance

**Approver:** Trust board

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**Policy author(s):** Chief Financial Officer

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**Summary of key changes made since last review:** Formatting updates to bring in line with the trust's policy template.  
Full revision of policy and process.

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Unless there are legislative or regulatory changes in the interim, this policy will be reviewed on an annual basis. Should no substantive changes be required at this point, the policy will move to the next review cycle.

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**Related policies:**

- MARK Trust Complaints Procedures Policy
- MARK Trust Debt Recovery Policy
- MARK Trust Freedom of Information Policy
- MARK Trust Freedom of Information Publication Scheme
- MARK Trust Financial Procedures & Practices Policy
- MARK Trust Data Protection Policy
- MARK Trust Anti-Fraud and Corruption Policy

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## **Statement of intent**

MARK Education Trust is committed to ensuring equal opportunities for all students, regardless of financial circumstances, and has established the following policy and procedures to ensure that no student is discriminated against by our offering of school trips, activities and educational extras.

In addition, we are committed to adhering to legal requirements regarding charging for school activities, and meeting all statutory guidance provided by the DfE.

The trust will:

- Never charge for the staffing costs of education provided during school hours as part of the Trust curriculum.
- Inform parents on low incomes and in receipt of relevant benefits of the support available to them when asking for contributions.

Please note that while this policy may be more or less generous than the Local Authority's policy, we have ensured it meets the requirements of the law.

The trust will ensure that this policy is published on its website.

## 1. Legal framework

This policy will have consideration for, and be in compliance with, the following legislation and statutory guidance:

- Education Act 1996
- Academies Act 2010
- Children Act 1989
- Freedom of Information Act 2000
- The Charges for Music Tuition (England) Regulations 2007
- The Education (Prescribed Public Examinations) (England) Regulations 2010
- DfE (2018) 'Charging for School Activities'
- DfE (2024) 'Academy trust governance guide'
- DfE (2024) 'What academies and further education colleges must or should publish online'
- The trust's Funding Agreement
- DfE (2024) 'Academy trust handbook 2024' (ATH)

This policy operates in conjunction with the following school policies:

- Complaints Procedures Policy
- Debt Recovery Policy
- Freedom of Information Policy
- Freedom of Information Publication Scheme
- Financial Procedures & Practices Policy
- Data Protection Policy
- Anti-Fraud and Corruption Policy

## 2. Definitions

### 2.1 For the purposes of this policy the following definitions will be used:

- Charge - a fee payable for specifically defined activities.
- Remission - the cancellation of a charge, partly or wholly, which would normally be payable.
- Voluntary contribution - a request for payment for goods and services but which is not obligatory. Where an activity cannot take place without sufficient total voluntary contributions, parents/carers will be made aware

## 3. Roles and Responsibilities

### 3.1 The governing board will be responsible for:

- The management of the school's delegated finances
- Ensuring the school acts in accordance with this policy at all times.
- Ensuring money is spent for the educational benefit of pupils attending the school, and for the benefit of pupils in other schools.
- Recognising its legal requirements regarding charging for school activities under the Education Act 1996 and meeting all additional guidance provided by the DfE.

### 3.2 The headteacher will be responsible for:

- Prioritising and allocating financial resources appropriately, ensuring efficiency, effectiveness and probity in the use of public funds.

- Informing parents on low incomes and in receipt of specific benefits of the support available to them when being asked for contributions towards the cost of school visits.
- Liaising with parents and staff regarding any charges being applied and making decisions regarding appropriate remissions on a case-by-case basis.

### **3.3 The finance department will:**

- Process and record payments for activities, taking into account any remissions applied.
- Ensure that the correct invoices are sent to parents, and that payment is received.

## **4. Charging for education**

### **4.1 We will not charge parents for:**

- Admission applications
- Education provided during school hours
- Education provided outside school hours if it is part of the national curriculum, part of a syllabus for a prescribed public examination that the student is being prepared for by the school, or part of religious education
- Instrumental or vocal tuition, unless provided at the request of the student's parents
- Entry for a prescribed public examination, if the student has been prepared for it at the school
- Examination re-sits, if the student is being prepared for the re-sits at the school

### **4.2 We may charge parents for the following:**

- Materials, books, instruments or equipment
- Optional extras
- Use of community facilities
- Music and vocational tuition (in certain circumstances)

## **5. Optional extras**

### **5.1 We may charge parents for the following optional extras:**

- 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 student is being prepared for at the school
  - Religious education
- Examination entry fees where the student has not been prepared for the examinations at the school
- 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 student on a residential visit
- Extended day services offered to students

### **5.2 When calculating the cost of optional extras, the school will take into account the following:**

- Materials, books, instruments or equipment provided in relation to the optional extra
- The cost of buildings and accommodation
- The employment of non-teaching staff
- The cost of teaching staff (including teaching assistants) 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

**5.3** The school will not charge in excess of the actual cost of providing the optional extra divided by the number of participating students. We will not charge a subsidy for any students wishing to participate but whose parents are unwilling or unable to pay the full charge. If a proportion of the activity takes place during school hours, we will not charge for the cost of alternative provision for those not participating.

**5.4** 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 pre-requisite for the provision of an optional extra.

## **6. Examination fees**

We may charge for examination fees if:

- The examination is on the prescribed list (which include GCSEs and A levels), but the student was not prepared for it at the school
- The examination is not on the prescribed list, but the school arranged for the student to take it
- A student fails, without good reason, to complete the requirements of any public examination where the governing body or LA originally paid or agreed to pay the fee

## **7. Examination re-sits**

**7.1** Where a student is entered for a second or subsequent attempt at an examination at one of the schools within the Trust, we will pay the fee.

**7.2** If a student or their parents consider it to be in the best interests of the student to request that an examination is re-marked, any fees involved must be covered by the student or their parents. If the awarding body changes the overall grade of the result, the school will not be charged by the awarding body and the parent/student will have their fees refunded.

## **8. Voluntary contributions**

**8.1** We may, from time-to-time, ask for voluntary contributions towards the benefit of the school or school activities. The school will strive to ensure that parents do not feel pressurised into making voluntary contributions. Measures which may make parents feel pressured, such as colour coded letters and direct debit or standing order mandates, will not be sent when the school requests contributions. We will also make it clear that there is no obligation for parents to make a contribution, and notify parents whether assistance is available.

**8.2** If the activity is necessary to meet an examination requirement, we may ask for contributions towards the cost of the activity. However, students' participation in the activity will not be dependent upon parental contribution. 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 and the school will set out how places will be allocated from the outset.

**8.3** If insufficient voluntary contributions are raised to fund a non-compulsory activity, and the school cannot fund it via another source, the activity will be cancelled and this will be made clear to parents.

## **9. Music tuition**

- 9.1** Music tuition is the only 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 student’s parents.
- 9.2** The charges will not exceed the cost of the provision, including the cost of the staff providing the tuition. No charge for music tuition will be made in respect of pupils who are Looked After Children (LAC).
- 9.3** Charging will also not be made if the teaching is provided under the first access to the KS2 Instrumental and Vocal Tuition Programme.
- 9.4** MARK Education Trust does not charge for or arrange Music Tuition. Although we do work in partnership with Create Music to support students’ access to music tuition lessons during the school day, subject to arrangement with the school, the tuition agreement is between the parent and Create Music.

## **10. Transport**

### **10.1 We will not charge for:**

- Transporting registered students to or from the school premises, where the LA has a statutory obligation to provide the transport
- Transporting registered students to other premises where the governing body or LA has arranged for students to be educated

## **11. Residential visits**

### **11.1 We will not charge for:**

- 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, part of a syllabus for a prescribed public examination that the student is being prepared for at the school, or part of religious education
- Supply teachers to cover for teachers accompanying students on visits

**11.2** We may charge for board and lodging – but the charge will not exceed the actual cost.

**11.3** The school may charge for board and lodging, but the charge will not exceed the actual cost. Parents can request financial support towards board and lodging costs if the student is eligible for free school meals (Years 7 – 11) or sixth form bursary (Years 12 and 13).

**11.4** The school will provide a form for parents to submit and provide proof of receipt of one of the above benefit payments in order to be eligible for the exemption.

## **12. Education partly during school hours**

**12.1** 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 is deemed to take place during school hours and no charge will be made.

**12.2** If less than 50 percent of the time spent on an activity occurs during school hours, it is deemed to have taken place outside school hours and we may charge for the activity; however, we will not charge if the activity is part of the national curriculum, part of a syllabus for a prescribed public examination that the student is being prepared for at the school, or part of religious education.

**12.3** Residential visits: 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, we will not charge for the activity.

**12.4** The remission of charges for board and lodging payments is the responsibility of the school. These costs will be borne by our contingency funds.

### **13. Damaged or lost items**

**13.1** 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.

### **14. Remissions**

**14.1** We have set aside a small fund to enable families in financial difficulty to send their children on visits and enrichment activities. The 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, the trip/activity will be cancelled.

**14.2** Parents can request financial support towards the costs of activities if the student is eligible for free school meals (Years 7 – 11) or sixth form bursary (Years 12 and 13).

**14.3** To request assistance, parents should contact the Chief Financial Officer via the following email: [a.poulton@beacon-academy.org](mailto:a.poulton@beacon-academy.org)

### **15. School Trip Refunds**

**15.1** 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.

**15.2** 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.

**15.3** In the event that a student 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 student's place on the trip, and whether the place on the trip can be offered to another student.

**15.4** Where a student 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 student to attend future trips and visits.

**15.5** In the event that a student 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 student's place on the trip and whether the place on the trip can be offered to another student.

**15.6** In the event that a school trip is postponed due to unforeseen circumstances, it will be at the school's discretion as to what happens with the parental contributions for the trip. The school will consider various options, which could include carrying forward the money until the trip takes place, transferring the money to another trip, or refunding parents.

- 15.7** In the event that the decision is made to postpone a trip due to foreseen circumstances, it will be at the school's discretion as to what happens with the parental contributions for the trip. The school will consider various options, which could include carrying forward the money until the trip takes place, transferring the money to another trip, or refunding parents.
- 15.8** Once trip arrangements have been booked and confirmed, if contributions exceed the total cost of the trip, the school will consider various options, which could include carrying forward the money until the trip takes place, transferring the money to another trip, or refunding parents.
- 15.9** The school will deal with cancellations and refunds on a case-by-case basis, ensuring that all students and their families are treated equally.
- 15.10** If a parent wishes to make a complaint about refunds, they will be able to do so via the trust Complaints Policy.

## **16. Income Generation**

- 16.1** In line with the DfE's Academies 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.

## **17. Freedom of Information Policy**

- 17.1** The trust's Freedom of Information Policy will set out where fees may be charged for the provision of information.