



INVICTUS



Education Trust



Charging and Remissions Policy



LEARN WITH **US** - WORK WITH **US** - BELONG WITH **US**

Document Control and Version Control

DOCUMENT CONTROL	
POLICY TITLE:	Charging and Remissions Policy
POLICY AUTHOR:	A. Clarke, Chief Finance Officer
VERSION NUMBER:	V 3.0
DATE APPROVED:	26.03.2026
DATE EFFECTIVE:	27.03.2026
DATE DUE FOR REVIEW:	December 2026
POLICY STATUS:	Statutory policy
POLICY TYPE:	Trust wide
REQUIRED TO PUBLISH:	Yes
POLICY LEAD:	CFO
APPROVAL LEVEL:	Finance, Risk and Audit Committee

VERSION CONTROL			
VERSION	AUTHOR	DATE	CHANGES
V 2.0	A. Clarke, CFO	November 2024	Policy Re-Write
V 3.0	A Clarke CFO	March 2026	Policy Review – no changes to content Insertion of parent impact assessment as per updated policy template

Contents

1. Our Mission, Vision and Values	3
2. Admissions.....	3
3. Education provided during school hours	3
4. Education provided outside of school hours	3
5. School meals.....	3
6. Prescribed public examinations.....	3
7. Materials, books, instruments or equipment	3
8. Music, instrumental or vocal tuition.....	4
9. Transport.....	4
10. Residential visits	4
11. Optional extras	5
12. Voluntary contributions.....	5
13. Refunds	5
14. Damage to property and breakages	6
15. Remissions	6
16. Complaints.....	6
17 Who is responsible for this policy?	6
18 Monitoring, Evaluation and Review	6
19 Linked Policies	7
20 Other Related Documents.....	7
Parental Impact Assessment.....	7

1. Our Mission, Vision and Values



Mission

'Excellence every day, unlimited ambition and transforming lives'



Vision

'To create a community of inclusive schools where people choose to learn with us, work with us and belong with us, so that everyone succeeds'



Values

- Respect
- Resilience
- Relationships

2. Admissions

The academy **does not** make requests for financial contributions (either in the form of voluntary contributions, donations or deposits (even if refundable)) as any part its admissions process.

3. Education provided during school hours

Subject to the limited exceptions outlined in this policy, the academy **does not** charge for education provided during school hours, including the supply of any materials, books, instruments or equipment.

4. Education provided outside of school hours

No charge will be made for education provided outside of school hours if it is part of the national curriculum, part of a syllabus for a prescribed public examination that the pupil is being prepared for by the academy or part of religious education.

5. School meals

The academy **does not** charge for school meals where the pupil is eligible for free school meals, up to the daily allowance set by the school. Parents may choose to top up their child's school meals account using the standard payment methods if they wish to exceed the daily free school meal allowance. Pupils who are not entitled to free school meals **will** be charged.

6. Prescribed public examinations

- 6.1 The academy **does not** charge for entry for a prescribed public examination (including re-sits) if the pupil has been prepared for it by the academy.
- 6.2 However, if a pupil fails, without good reason, to meet any examination requirement for a syllabus, the academy **may** seek to recover the fee from the pupil's parent/carer.
- 6.3 If the registered pupil has not been prepared for the examination(s) at the school then the entry fees will be charged. The full or real cost of the examination entry will be charged, including e-payment fees, the administration of the entry and administration of the examination. For example invigilation, including where specialist exam access arrangements are in place.
- 6.4 Applications for post results services for example reviews of marking and copies of papers will be charged to the candidate / parents. If the review or appeal is successful and the fees are re-imbursed by the awarding organisation these will also be re-imbursed by the school to the candidate / parents. The full or real cost of the service will be charged, including e-payment fees, and the administration of the entry.

7. Materials, books, instruments or equipment

- 7.1 The academy **may** charge for materials, books, instruments or equipment that the parent/carer wishes their child to keep or own. This includes clothing or equipment required for health and safety, or for example sports equipment.

Charging and Remissions Policy

- 7.2 Specialist equipment or clothing required for work experience or industry placements would not normally be provided by the school or trust.
- 7.3 Printing associated with a programme of study will not be charged. Excessive printing beyond reasonable expectations of the course may be charged once a reasonable limit set by the IT team has been reached.
- 7.4 Students are issued with an ID badge and lanyard that is used to access catering and other services in school. If the card is damaged, lost or stolen the school may charge a fee for the replacement and printing of a new card.
- 7.5 Learners will be charged UCAS application fees and similar if applicable for international applications. Students may pay the fee directly to UCAS and Bursary students may have application fees paid by the bursary fund.
- 7.6 Such charges will reflect the real cost of the equipment or service. That may include e-payment fees and administration costs, but must not generate a surplus or profit.

8. Music, instrumental or vocal tuition

- 8.1 The academy **may** charge for tuition in singing or in playing a musical instrument during school hours if it is provided at the request of the pupil's parent/carer. This applies to individual and group tuition.
- 8.2 The charges will reflect the real cost of the service and may include staff costs, instruments, books, exam fees, e-payment fees and administration costs, but must not generate a surplus or profit.
- 8.3 **No charge** will be made if the tuition is:
- provided to a pupil who is looked after by a local authority;
 - provided to a child who is eligible for pupil premium or free school meals;
 - provided as part of the national curriculum during school hours or required as part of a syllabus for a prescribed public examination for which the pupil is being prepared by the academy.

9. Transport

The academy **does not** charge for:

- transporting pupils to or from the academy's premises where the local authority has a statutory obligation to provide transport
- transporting pupils to other premises where the governing body 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 by the academy

10. Residential visits

10.1 The academy **does 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, or part of a syllabus for a prescribed public examination that the pupil is being prepared for by the academy or is part of religious education
- supply teachers to cover for those teachers who are accompanying pupils on a residential visit

10.2 The academy **will** charge for board and lodging relating to residential visits (see **section 10.1**).

11. Optional extras

- 11.1 The academy **does** charge for 'optional' extras.
- 11.2 Participation in any optional extra activity will be on the basis of parental choice and a willingness to meet the charges. Parental agreement will be required before an optional extra for which a charge is made is provided.
- 11.3 Optional extras include:
- 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 by the academy or part of religious education
 - examination entry fee(s) if the pupil has not been prepared for the examination(s) by the academy
 - other transport (outside of that outlined in **section 9**)
 - board and lodging for a pupil on a residential visit
 - extended day services offered to pupils (for example breakfast club, after-school clubs, tea and supervised homework sessions)
- 11.4 In calculating the cost of an optional extra an amount **will** 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, which includes supply teachers engaged specifically to provide the optional extra
 - 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
 - e-payment costs
 - administration costs
 - contingency costs where appropriate, determined on a case-by-case basis.
- 11.5 Any charge for an optional extra will reflect the real and actual cost of providing the optional extra, divided equally by the number of pupils participating. It **will not** include an element of subsidy for any other pupils wishing to participate in the activity whose parent/carer is unwilling or unable to pay the full charge.

12. Voluntary contributions

- 12.1 The academy may ask parents/carers for voluntary contributions for the benefit of the academy or any of its activities.
- 12.2 Where it is intended that an activity is to be funded by voluntary contributions, the Principal/Head of School will ensure that parents/carers are made aware at the outset that:
- the activity cannot be funded without voluntary contributions
 - there is no obligation to make any contribution
 - if insufficient voluntary contributions are raised to fund the activity, and the academy is unable to fund it from some other source, then the activity will be cancelled
- 12.3 No pupil will be excluded from an activity simply because his or her parent/carer is unwilling or unable to pay. Pupils whose parents/carers are unwilling or unable to pay will still be given an equal chance to participate in the activity.

13. Refunds

- 13.1 Request for refunds for activities will be considered on an individual basis and may be rejected if the academy is unable to recoup the costs incurred. Refunds will be made if the amount is greater than £5 per participant,

Charging and Remissions Policy

due to the administration burden of the refunds. Smaller amounts may be used to provide additional services or value to the students who participated in the activity. For example, additional resources to use in their classroom.

- 13.2 In all cases of withdrawal, either voluntarily or otherwise, applications should be made in writing to the Principal/Head of School. If approved, refunds will be processed via the original method of payment.
- 13.3 The academy reserves the right not to refund costs where a pupil is withdrawn from an activity by the academy on the basis of a pupil's breach of the academy's behaviour policy.

14. Damage to property and breakages

- 14.1 Where the academy's property has been wilfully or recklessly damaged by a pupil or parent/carer, the academy **may** charge those responsible for some or all of the cost of repair or replacement.
- 14.2 Where property belonging to a third party has been damaged by a pupil, and the academy has been charged, the academy **may** charge those responsible for some or all of the cost.

15. Remissions

Parents/carers who can prove they are in receipt of the following benefits **may** be exempt from paying certain costs (including the cost of board and lodging related to residential visits):

- Income Support
- Income based Job-seekers Allowance
- Child Tax Credit (where the person is not receiving Working Tax Credit as well and has an annual gross income of no more than £16,190)
- Support under part VI of the Immigration and Asylum Act 1999
- Guaranteed Element of State Pension Credit
- Working Tax Credit run-on
- Income related employment and support allowance
- Universal Credit

16. Complaints

Complaints regarding this policy or its application should be raised under the academy's usual complaints procedure.

17 Who is responsible for this policy?

The Trust has overall responsibility for the effective operation of this policy and for ensuring compliance with the relevant statutory framework or Trust framework. The Trust has delegated day-to-day responsibility for operating the policy to the Chief Financial Officer, the Accounting Officer and the Headteacher of each school.

The Finance and Operations Manager and Senior Leadership Team at each trust school has a specific responsibility to ensure the fair application of this policy and all members of staff are responsible for supporting colleagues and ensuring its success.

18 Monitoring, Evaluation and Review

The policy will be promoted and implemented throughout all Trust schools. The Trust will monitor the operation and effectiveness of arrangements referred to in this policy at each Trust school.

The Trust will review this policy annually in consultation with each Trust school.

19 Linked Policies

- Complaints Policy
- Positive Conduct Policy
- Educational Visits Policies
- Relevant Finance Policies
- Equality and Diversity Policy
- 16-19 Bursary Policy

20 Other Related Documents

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.

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

This policy should be a working document that is fit for purpose. It represents the school ethos, enables consistency and quality across the school.

Parental Impact Assessment

As part of the policy review process, consideration has been given to whether the policy, or any changes to it, has a direct impact on parents and carers. This includes assessing whether changes affect parental responsibilities, required actions, communication processes, or understanding of Trust or school practices.

Decision:

The Trust Executive Team has determined that parental communication is:

- ✓ Required for this policy. Method of communication will be: via a message sent to parents on Arbor