

Charging and Remissions Policy

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1. Statement of Intent

At Keystone Academy Trust, our Christian ethos underpins everything we do. Guided by our values of integrity, compassion, service and hope, we are committed to ensuring that every child is valued, included and able to access the full life of their school, regardless of financial circumstance.

We believe that educational visits, enrichment activities and wider opportunities make an important contribution to pupils' spiritual, moral, social and cultural development. No child should be disadvantaged or excluded from these experiences because of financial hardship. This policy therefore seeks to balance our responsibility to use public funds wisely with our commitment to fairness, equity and supporting those who may need additional help.

The trust is committed to meeting legal requirements relating to charging for school activities and to having due regard to relevant Department for Education guidance.

We will:

- Treat all families with dignity, respect and sensitivity when discussing financial matters.
- Ensure that no child is treated less favourably because of their family's financial circumstances.
- Promote equality of opportunity by providing support, where possible, for families experiencing financial hardship.
- Not charge for education provided during school hours except where legislation permits.
- Inform parents of any support available when contributions or charges are requested.

2. Legal Framework

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

- Education Act 1996
- The Charges for Music Tuition (England) Regulations 2007
- The Education (Prescribed Public Examinations) (England) Regulations 2010
- DfE, Charging for school activities
- Academy Trust Handbook 2026 (effective from 1 October 2026)
- The Trust's Academy Funding Agreement

3. Charging for Education

Academies 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 pupil is being prepared for by the school, or part of religious education
- Instrumental or vocal tuition, unless provided at the request of the pupil's parents, subject to the statutory exceptions.

Academies may charge parents for the following:

- Materials, books, instruments or equipment, where they desire their child to own them
- Optional extras such as eligible school visitors or school visits
- Music and vocational tuition in circumstances where charging is permitted
- The use of community facilities.

4. Optional Extras

The school may charge for the following optional extras:

- education provided outside school time that is not part of the national curriculum or religious education
- examination entry fees where the pupil has not been prepared for the examination at the school
- transport other than transport for which the local authority or Trust Board has a statutory responsibility
- board and lodging for a pupil on a residential visit
- extended day services offered to pupils, such as breakfast or out-of-school provision.

When calculating the cost of optional extras, an amount may be included for:

- materials, books, instruments or equipment provided in connection with the optional extra;
- buildings and accommodation;
- non-teaching staff, including teaching assistants;
- teaching staff engaged under contracts for services solely to provide the optional extra; and
- the cost, or an appropriate proportion of the cost, of teaching staff employed to provide optional vocal or instrumental tuition.

The charge will not exceed the actual cost of providing the optional extra, divided by the number of participating pupils. The cost must not include a subsidy for pupils whose parents are unwilling or unable to pay. Where a small proportion of an activity takes place during school hours, the school will not charge for alternative provision for pupils who do not participate.

The school will not charge for supply teachers covering teachers who accompany pupils on a residential visit.

Participation in an optional activity will be based on parental choice and willingness to meet the charge. Parental agreement is therefore required before an optional extra for which a charge is made is provided.

Parents will be informed how any charge has been calculated.

5. Voluntary Contributions

Academies may ask for voluntary contributions towards the benefit of the school or school activities. Where an activity cannot be funded without voluntary contributions, this will be made clear to parents at the outset. Communications will make clear that there is no obligation to contribute and will explain whether assistance is available.

No child will be excluded from an activity because their parents are unwilling or unable to contribute. If insufficient voluntary contributions are raised and the academy cannot fund the activity from another source, the activity may be cancelled.

The Trust will seek to ensure that parents do not feel pressurised to make voluntary contributions. Measures that may create pressure, such as colour-coded letters or direct debit or standing order mandates, will not be used when requesting voluntary contributions.

6. Music Tuition

Music tuition is an exception to the general rule that education provided during school hours is free. The Charges for Music Tuition (England) Regulations 2007 permit charges for vocal or instrumental tuition provided individually or in groups of any size where the tuition is requested by the pupil's parent, subject to the statutory exceptions.

Charges will not exceed the cost of the provision, including the cost of staff providing the tuition.

7. Transport

Academies will not charge for:

- transporting registered pupils to or from school premises where the local authority has a statutory obligation to provide transport; and
- transporting registered pupils to other premises where the Trust Board or local authority has arranged for pupils to be educated.

8. Education partly during school hours

Where an activity takes place partly during and partly outside school hours, the statutory basis will be used to determine whether it is treated as taking place during or outside school hours. A charge may

only be made for the part outside school hours where the activity is not part of the national curriculum or religious education.

If 50% or more of the time spent on the activity occurs during school hours, it will be treated as taking place during school hours. Travel time counts where the travel occurs during school hours. The break in the middle of the day is not included within school hours.

Where less than 50% of the time falls during school hours, the activity will be treated as taking place outside school hours.

9. Residential Visits

If the number of school sessions taken up by a visit is equal to or greater than 50% of the number of half-days spent on the visit, it will be treated as taking place during school hours. A half-day is any period of 12 hours ending at noon or midnight.

The school will not charge for:

- education provided on a visit taking place during school hours;
- education provided outside school hours where it forms part of the national curriculum, a syllabus for a prescribed public examination for which the pupil is being prepared by the school, or religious education; and
- supply teachers covering teachers who accompany pupils on visits.

The school may charge for board and lodging, but the charge will not exceed the actual cost. Parents will be exempt from board and lodging charges where the statutory remission criteria apply, including receipt of a qualifying benefit. The school will check the current DfE eligibility criteria when considering an application.

10. Damaged or Lost Items

Academies may charge parents for the cost of replacing items broken, damaged or lost as a result of their child's behaviour. The trust will consider the circumstances of each case and apply any charge fairly and proportionately. Parents will not be taken to court for failure to pay such costs.

11. Remissions

Each academy will have arrangements to consider requests for financial assistance so that pupils are not disadvantaged because of family financial circumstances. Support is subject to available funding and will be allocated fairly, consistently and on the basis of assessed need.

Parents receiving a qualifying benefit, or experiencing financial hardship, may request assistance with the cost of an activity. The academy will use the current statutory and DfE eligibility criteria when determining remission for board and lodging and will consider wider hardship support on a case-by-case basis.

Parents should contact the Academy Office to request assistance. Evidence may be requested where it is necessary to establish eligibility. Information will be handled sensitively and confidentially.

Where the statutory calculation means that a residential visit takes place during school hours, no charge will be made for the education provided as part of the visit.

12. School Trip Refunds

It is good practice to test the financial viability of a proposed visit with parents before making a booking.

Any non-refundable deposit will be clearly identified before payment is requested. The amount retained will not exceed costs that the academy cannot reasonably recover.

If the academy cancels a trip, parental payments will be refunded, less only any clearly identified and evidenced costs that cannot be recovered from the provider or insurer. The Headteacher will consult the CFO before a decision is communicated.

If a trip is postponed, the Headteacher will consult the CFO and tell parents whether payments will be carried forward, transferred to an agreed alternative activity or refunded. Any decision will take account of recoverable and unrecoverable costs and will be applied consistently.

If a pupil or parent cancels a place, or a pupil cannot attend at short notice, any refund will be considered case by case. The decision will take account of costs already incurred, sums recoverable from the provider or insurer, whether the place can be filled, and the reason for cancellation. Decisions will be fair, transparent and consistent.

A pupil will not be refused access to a future trip solely because a previous trip place was cancelled or a refund was made.

Where payments exceed the total cost of a trip, the academy will return the surplus where it is practicable and proportionate to do so. Any de minimis approach will be communicated to parents in advance.

Complaints about the application of this section may be made under the Trust's Concerns and Complaints Policy.

13. Monitoring and Review

The CFO will provide assurance to the Finance, Audit and Risk Committee summarising the operation of this policy across the trust, including the use of remissions, significant refunds, complaints and any compliance issues. Any significant policy breach, complaint alleging discrimination, or material financial loss arising from charging or remission decisions will be reported to the CEO and Chair of Trustees without delay.

The Board of Trustees will review this policy annually. The trust will also review the policy sooner where legislation, statutory guidance or relevant DfE guidance changes.