

Charging and Remissions Policy

DOCUMENT CONTROL

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Please note that a record of the changes made to the original issue of this document can be found at Schedule 1 after any Appendices to the Policy/Procedure.

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The purpose of this policy and who it applies to:

This policy sets out Cumbria Education Trust's (the Trust) approach to charging and remissions to ensure transparency in setting charges and to ensure all young people are able to access all of the provision offered by the Trust.

The Education Act 1996 sets out the law on charging for school activities. The Trust is required, through school funding agreements, to comply with the law on charging for school activities. Under these charging provisions, the Trust may choose to charge for certain defined activities, but only if it has a drawn-up charging and remissions policy.

This policy is based upon departmental advice offered to governing bodies, school leaders, school staff and local authorities when setting out policy on charging and remissions for school activities and school visits.

1. INTRODUCTION

- 1.1. The Trust is committed to the general principle of free education and recognises the valuable contribution that a wide range of activities, including school visits and residential experiences, can make towards all aspects of pupils/students' education. It also aims to promote and provide such activities both as part of a broad and balanced curriculum for pupils/students and as additional optional enrichment activities.
- 1.2. The Trust believes that all our pupils/students should have an equal opportunity to benefit from academy activities and visits (curricular and extra-curricular) independent of their parent's financial means.
- 1.3. Some Trust schools provide recreation and leisure opportunities to the wider community, e.g. hire of facilities, use of fitness centre and sports facilities. Charges for these facilities are *not* covered by this policy (*refer to the hire and lettings policy*), nor does the policy cover charges made and determined by other organisations offering activities and services on school premises.
- 1.4. The Trust acknowledges that offering opportunities on a 'first pay, first served' basis discriminates against pupils/students from families on lower incomes and the Trust will avoid that method of selection.
- 1.5. This policy identifies activities for which:
 - The basis of charging and the limitations of charging and when charges will not be made
 - Optional extras which may be charged for
 - Voluntary contributions
 - Instances where charges may / will be applied
 - Remissions, where charges may be reduced or waived entirely.
- 1.6. This policy should be made available to parents on request.

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Note: where this policy refers to parents, we mean any person with parental responsibility for a child or young person.

1.7. The Trust recognises its responsibility to ensure that the offer of activities and educational visits does not place an unnecessary burden on family finances. To this end the Trust will try to adhere to the following guidelines:

- where possible Trust schools will publish a list of visits (and their approximate cost) at the beginning of the academic year so that parents can plan ahead;
- have established systems within schools for parents to pay in instalments; and
- when an opportunity for a trip arises at short notice a school may be able to arrange for parents to pay by instalments beyond the date of the trip.

2. WHEN NO CHARGES WILL BE MADE:

2.1. Education

- an admission application.
- 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, or part of a syllabus for a prescribed public examination that the pupil/students is being prepared for, or part of the schools' basic curriculum for religious education.
- tuition for pupils/students learning to play musical instruments (or singing) if the tuition is required as part of the National Curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for, or part of religious education. This includes the first access to the Key Stage 2 Instrumental and Vocal Tuition Programme (Wider Opportunities).
- entry for a prescribed public examination if the pupil/student has been prepared for this.
- examination re-sit(s) if the pupil/student is being prepared for the re-sit(s) at the school, however, if a pupil/student fails, without good reason, to meet any examination requirement for a syllabus a charge will be made.

2.2. Transport

- transporting registered pupils to or from the school premises, where the local education authority has a statutory obligation to provide transport.
- transporting registered 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 he has been prepared for that examination at the school.
- Transport provided in connection with an educational visit, taking place during school hours.

2.3. However, costs incurred in providing home to school transport for students/pupils who live outside of the academies designated catchment area can be charged. Further guidance on school transport can be found at [Home to School Transport Guidance](#).

2.4. Educational 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:

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- the National Curriculum
 - a syllabus for a prescribed public examination that the pupil is being prepared for at the school
 - part of the school's basic curriculum for religious education
- supply staff to cover for those staff who are absent from school accompanying pupils on a residential visit.

3. VOLUNTARY CONTRIBUTIONS

- 3.1. When charges do not apply, Trust schools will seek voluntary contributions to help fund the range of opportunities offered to pupils/students. All requests for voluntary contributions will emphasise their voluntary nature and the fact that pupils/students of parents who do not make such contributions will be treated no differently from those who have.
- 3.2. Whilst no young person will be excluded from an activity on the basis of a parent's inability or unwillingness to pay this contribution, the school reserves the right to cancel an activity in its entirety if insufficient voluntary contributions are received. Where there are not enough voluntary contributions, and there is no way to make up the shortfall, for example school funds and/or fundraising activities, the activity must be cancelled. The possibility of the activity/visit being cancelled due to a shortfall in contributions should be made clear in the information sent to parents.
- 3.3. The Law states:
- if an activity cannot be funded without voluntary contributions the Headteacher will make this clear to parents from the outset.
 - no child will be excluded from an activity because his or her parents are unable or unwilling to pay.
 - if insufficient contributions are received, the trip or activity may have to be cancelled.
 - if a parent is unwilling or unable to pay their child will still be given an equal chance to partake.

4. CHARGES MAY BE MADE FOR:

- 4.1. Schools may recover the full costs of some items and activities, but charges will not exceed the actual cost, for:
- activities that take place out of school hours; this kind of activity is often referred to as an 'optional extra' (see section 5 below) and includes the pupil/students board and lodging costs, entrance fees to museums, castles, theatres, etc. insurance costs, non-teaching staff costs and the expenses of participating teachers engaged on a separate contract for services to provide the 'optional extra'.
 - materials, books, instruments, and other equipment where the child's parent wishes him/her to own them.
 - certain early years provision (i.e. hours in excess of funded hours and provision for 2-year-olds).
 - third party / community use of school facilities (see separate hire and lettings policy).
 - non-attendance "without good reason" of any public examination that incurs a fee.
 - music and vocal tuition, in limited circumstances.

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- school meals
- school milk scheme
- before and/or after school care

4.2. The trust's finance team will support schools in setting charges for services, trips and activities.

4.3. Further details on how these charges may be applied is covered in section 6 – application of charges.

5. OPTIONAL EXTRAS

5.1. Where an optional extra is being provided, a charge **can** be made for providing materials, books, instruments, or equipment. Optional extras are:

- 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.
- 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/governing body have 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 (for example breakfast club, after-school clubs, tea, and supervised homework sessions).

5.2. In 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, this includes supply teachers engaged specifically to provide the optional extra; and
- 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.

5.3. Any charge made in respect of individual pupils must not exceed the actual cost of providing the optional extra activity, divided equally by the number of pupils participating. It must not therefore include an element of subsidy for any other pupils wishing to participate in the activity whose parents are unwilling or unable to pay the full charge. Furthermore, 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. No charge can be made for supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential visit.

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5.4. Parents will be notified in advance of any 'optional extras' which a school proposes to organise and the estimated cost. Parental consent will be obtained if their children are to participate in any activities for which a charge may be made. Participation in any optional extra activity will be on the basis of parental choice and a willingness to meet the charges. Parental agreement is therefore a necessary pre-requisite for the provision of an optional extra where charges will be made.

5.5. Music Tuition

5.5.1. Although the law states that, in general, all education provided during school hours must be free, instrumental, and vocal music tuition is an exception to that rule. The Charges for Music Tuition (England) Regulations 2007 set out the circumstances in which charges can be made for tuition in playing a musical instrument, including vocal tuition. They allow charging for tuition in larger groups than was previously the case. Charges may now be made for vocal or instrumental tuition provided either individually, or to groups of any size, provided that the tuition is provided at the request of the pupil's parent. Charges may not exceed the cost of the provision, including the cost of the staff who provide the tuition.

5.5.2. The regulations make clear that charging may not be made if the teaching is either an essential part of the national curriculum or is provided under the first access to the key stage 2 Instrumental Vocal Tuition Programme. They also make clear that no charge may be made in respect of a pupil who is looked after by a local authority (within the meaning of section 22(l) of the Children Act 1989).

5.6. Cooking Ingredients and/or materials for Technology Lessons

5.6.1. Schools can make a charge to cover the costs of materials/ingredients for subjects such as design or food technology where parents have indicated in advance that they would like their child to bring home the finished product.

5.7. Exam Fees

5.7.1. An examination entry fee may be charged to parents if:

- the examination is on the set list, but the pupil was not prepared for it at the school;
- the examination is not on the set list, but the school arranges for the pupil to take it;
- a pupil fails without good reason to complete the requirements of any public examination where the school paid or agreed to pay the entry fee.

5.8. School Meals

5.8.1. School meals are available to pupils, at a daily cost set and reviewed no less than annually. Pupils of families entitled to free school meals receive a daily allowance of the same amount.

5.8.2. Families can find out how to [Apply for free school meals - GOV.UK \(www.gov.uk\)](http://www.gov.uk) or they can apply to their home Local Authority. Families needing help to do this can ask at their school office.

5.8.3. Payment for school meals is required in advance. To prevent arrears accumulating, protect

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the school budget and to support families with planning and budgeting, we use cashless catering services and payments online directly from families.

5.8.4. If a pupil's entitlement to free school meals has expired, a parent or carer must provide a packed lunch or make funds available through the cashless payment system.

5.8.5. Schools are not obliged to provide a meal without payment or when there is no entitlement to a free school meal

5.9. School Milk Scheme

5.9.1. Under [The Requirements for School Food Regulations 2014 \(legislation.gov.uk\)](https://www.legislation.gov.uk) all schools must make lower fat milk or lactose reduced milk available at least **once** a day during school hours or the lunch break at a fair cost or free of charge to all pupils who are entitled.

5.10. Before and/or after school care

5.10.1. Charges will be made for childcare services offered to pupils before school, after school and during school holidays when they are run by the Trust schools.

5.10.2. The fees and remissions are set and reviewed no less than annually. For information about current childcare charges please see the individual school's website.

5.10.3. No charges will be made for accessing breakfast clubs being run as part of the Government's free breakfast club programme, by participating schools.

5.11. Certain early years provision

5.12. Government funding covering the cost of delivering 15 or 30 hours per week of free, high quality, flexible childcare for children aged 3-4 years and for some 2-year-olds does not include the cost of meals, snacks, consumables such as nappies or sunscreen, additional hours or additional services such as trips or outings for which there will be charges.

5.13. Families are encouraged to supply their children with a healthy snack and drink from home, and, if they stay for the lunchtime period between the morning and afternoon nursery sessions, a healthy lunch or make arrangements to pay for the healthy snacks and meals school can provide.

5.14. Additional hours and services will be charged at the current hourly rate where hours are not fully funded as Early Education defined by the local authority. This includes the lunchtime period between sessions.

5.15. Charges for additional services such as trips will be agreed in advance with families.

5.16. The free entitlements will be delivered consistently so that all children accessing any of the free entitlements will receive the same quality and access to provision, regardless of whether they opt to pay for additional hours and/or services.

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5.17. We will not charge a deposit to secure a child's free place and there is no requirement to pay a registration fee as a condition of taking up a child's free place.

5.18. We will also not charge 'top up fees' to recoup the difference between the amount received by the local authority and the current hourly rate.

5.19. **Damage to Property**

5.19.1. The Trust will attempt to recover some, or all of the costs incurred repairing wilful damage or breakage of any academy property, or of any property belonging to a third party where the academy has been charged. The actual amount will be determined by the Headteacher.

6. APPLICATION OF CHARGES

6.1. The principles of best value will be applied when planning activities that incur costs to schools and/or charges to parents and carers.

6.2. When charges are made for activities, they will be based on the costs incurred, divided by the total number of pupils participating. There will be no additional charge levied on those who can pay in order to subsidise those who cannot.

6.3. **Non-residential activities**

6.3.1. Where the majority of time spent on a non-residential activity is *within* normal school hours, the charging regime will be as if it happens *fully within* school hours and no charge will be made. The majority of time is defined as 50% or more. Parents or carers may still be asked for a voluntary contribution.

6.3.2. Where the majority of the time spent on a non-residential activity is *outside* of normal hours, the charging regime will be as if it happens *fully outside* school hours i.e. the activity becomes an 'Optional Extra' and charges will be made unless 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. The majority of time is defined, in this case, as more than 50%. Travel time is included when considering the time spent on an activity only when it occurs during school time.

6.4. **Residential Visits / Activities**

6.4.1. Parents and carers will be charged board and lodgings for a pupil to attend a residential visit unless remission is granted, (see section 7).

6.4.2. To cover any other costs associated with a residential visit e.g., transport, activity tuition, for which charges cannot be made, they will be asked to make a voluntary contribution. No child will be denied the opportunity of attending a residential (if it is not an Optional Extra) if their parents or carers do not contribute voluntarily.

6.4.3. If not enough voluntary contributions are received to cover the costs of a residential, the school reserves the right to cancel it.

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- 6.4.4. Charges will be made to cover all residential visit costs only where the visit is deemed to be an 'optional extra' because the number of half-day school sessions missed by the pupils taking part totals less than half of the number of half-days taken up by the activity.

Example 1: Pupils are away from noon on Wednesday to 9pm on Sunday. This counts as 9 half days including 5 school sessions, so the visit is deemed to have taken place during school hours.

Example 2: Pupils are away from school from noon on Thursday until 9pm on Sunday. This counts as 7 half days including 3 school sessions, so the visit is deemed to have taken place outside school hours.

7. REMISSIONS

- 7.1. Where the parent of a child is in receipt of qualifying state benefit, the Trust will remit an amount proportionate to the cost of board and lodging for a residential activity that is organised for the student, and which takes place in term time.
- 7.2. Details of appropriate benefits can be found at <https://www.gov.uk/apply-free-school-meals>.

8. Further sources of information and advice

[Charging for school activities - Departmental advice for governing bodies, school leaders, school staff and local authorities](#) — includes frequency asked questions from page 11

[Home to School Transport Guidance](#)

[Learning Outside the Classroom - CLOtC - Helping you take your teaching beyond the classroom](#)

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DOCUMENT CONTROL – RECORD OF CHANGES

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002	March 2022	Reviewed.
003	March 2023	Reviewed.
004	June 2024	Reviewed, no changes required.
005	June 2025	Reviewed, no changes required.
006	June 2026	Reviewed. Sections added: School Meals, School Milk Scheme, Before and/or after school care, Certain early years provision. Some sections slightly reworded and reorganised within policy.

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