THE CONSORTIUM
ACADEMY TRUST

Shaping Positive Futures

Charging & Remissions Policy

The Consortium Academy Trust
An Exempt Charity Limited by Guarantee
Company Number 07665828

Status:	Live
Policy Owner	Director of Finance
Statutory / Recommended	Statutory
Date Adopted	14 May 2018
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Linked Documents and Policies	Financial Regulations
Equality Impact Statement	Equality Impact Statement: The Trust uses Equality Impact Assessments to consider policies and processes focussing on fairness, access and inclusion and how different groups might be affected. This includes the requirement to make reasonable consideration and adjustments to account for the individual needs of employees. This is part of our duty under the Equality Act (2010).

This document can only be considered valid when viewed on The Consortium Academy Trust website. If the copy is printed or downloaded and saved elsewhere the Policy date should be cross referenced to ensure the current document is referenced. The linked policies can be viewed at www.consortiumtrust.co.uk

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Policy Statement

Why the Policy Is Needed

The Consortium Academy Trust is committed to ensuring that no learner is denied access to education and educational opportunities because of financial circumstances. The Trust recognises the significant value that educational visits, residential experiences, enrichment activities, music tuition and other opportunities make to learners' personal development, wellbeing and academic achievement.
Whilst education provided during the school day must be free, there are circumstances where legislation permits schools and academy trusts to make charges for specific activities and services. The Trust therefore requires a clear and consistent framework to ensure that charges are applied fairly, transparently and in accordance with statutory requirements.

The Trust also recognises that some families may experience financial hardship and is committed to supporting learners through a fair and equitable remissions process where appropriate.

What the Policy is About

This policy sets out the principles and arrangements governing charging and remissions across all schools within The Consortium Academy Trust.
The policy explains:

- Activities and services for which charges cannot be made.
- Activities and services for which charges may be made.
- The basis on which charges will be calculated.
- The circumstances in which voluntary contributions may be requested.
- The criteria and process for applying for remission of charges.
- Arrangements relating to educational visits, residential experiences, examination entries and music tuition.
- The responsibilities of schools, parents/carers and the Trust in relation to charging and refunds.

The policy ensures that charging practices are applied consistently across the Trust and comply with relevant legislation, Department for Education guidance and the Trust's financial governance arrangements.

What the Policy Will Achieve

Through the implementation of this policy, the Trust will:

- Ensure compliance with statutory requirements and Department for Education guidance relating to charging and remissions.
- Promote fairness, transparency and consistency in charging arrangements across all Trust schools.
- Support equitable access to educational opportunities and enrichment activities for all learners.

- Reduce financial barriers for disadvantaged learners through the application of remissions and hardship arrangements.
- Provide clarity for parents/carers regarding when charges may be made and when financial support may be available.
- Enable schools to recover appropriate costs where permitted by legislation.
- Support sound financial management and stewardship of Trust resources.

By maintaining a clear and transparent Charging & Remissions Policy, the Trust aims to balance its responsibility to provide accessible educational opportunities for all learners with its duty to manage public funds responsibly and sustainably.

This Policy shall be reviewed in accordance with the above review date, or earlier should there be a legal requirement, business requirement or any collective agreement that necessitates a change.

1 Introduction

The Consortium Academy Trust (The Trust) is required by the Education Act 1996 to set out its policy for charging for school activities. Education provided during school hours must be free – the definition of education includes materials, equipment and transport provided in school hours by the Trust to carry learners between their school and an activity.

The Trust recognises the valuable contribution that the wide range of additional activities, including sports, clubs, societies, music trips and residential visits can make towards learners' education. The Trust aims to promote and provide such activities both as part of a broad and balanced curriculum and as additional optional activities.
Within this policy, the term "school" refers to any institution that is part of The Consortium Academy Trust, unless otherwise stated.

2 Purpose

The purpose of this policy is to set out where charges will and will not be raised by the Trust. The policy also explains the criteria for qualifying for remission from charges and the process for applying for remission.

3 Legal Framework

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

- Academies Act 2010
- DfE (2025) 'Academy Trust Handbook'
- DfE (2026) 'Academy Trust Handbook" (from 1 October 2026)
- DfE 'Academy Trust Governance Guide'
- DfE 'What academies and further education colleges must or should publish online'
- Education Act 1996
- Children Act 1989
- The Charges for Music Tuition (England) Regulations 2007
- The Education (Prescribed Public Examinations) (England) Regulations 2010
- Freedom of Information Act 2000
- DfE (2018) 'Charging for school activities'
- The Trust's Funding Agreement

4 Summary of Charges

Charges will not be made 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 learner is being prepared for by a Trust school, or part of religious education.
- Instrumental or vocal tuition, for pupils learning individually or in groups, unless provided at the request of the pupil's parent.
- Entrance fees for prescribed examinations, where the learner is being formally prepared by a Trust school.
- Examination resits, if the learner is being prepared for the resits at a Trust school.
- An exam result appeal, where there are a large number of candidates with results that are unsatisfactory in a specific subject, and the Headteacher supports the request.

Charges will be made for:

- Optional extra activities which take place wholly or mainly outside school hours (i.e. at least 50% outside school hours) and which are based on parental choice.
- Early years provision outside of core educational responsibilities.
- Music tuition for which there is a parental agreement and where it does not form part of the curriculum or part of the syllabus for a prescribed examination.
- Wilful damage to Trust property, equipment or furniture.
- Lost or damaged textbooks, exercise books or planners.
- Materials, books, instruments, ingredients or equipment, where parents/carers have indicated a wish to own them.
- The recovery of examination fees where the learner fails, without good reason/ medical certificate, to complete the examination requirements for any public examination for which the school has paid an entry fee.
- Examination entries where there is a request from the parent/carer for additional subject entries to be made which are not supported by the school.
- Resits for A Levels or BTEC unit tests.
- Individual exam result appeals to the Exam Board based on parental requests where the appeal is not supported by the school – payment must be made before the appeal is lodged.
- Board and lodgings on residential visits.
- Extended day services offered to pupils, e.g. breakfast or out-of-school provision

5 Detail of Charges

Provision of education
No charge shall be made in relation to the education of registered learners where education is provided during school hours. Where education is provided outside of school hours, no charge will be made provided the activity is required as part of the syllabus/curriculum.

Visits during the school day
A voluntary charge may be levied to cover the cost of educational visits and other activities. However, the charges cannot be enforced where this trip forms part of the curriculum or the majority of the visit has taken place during the school day (at least 50% of the trip based on the school day divided into two sessions). The charge will only include the direct costs for an individual pupil and will not include any element of subsidy for other pupils participating in the trip.

Residential visits (overnight stays)
Where the majority of the visit has taken place during the school day (at least 50% of the trip based on the school day divided into two sessions) or it is part of the required curriculum, no compulsory charge for the education provided and the travel costs can be made but the school can, however, levy a mandatory charge for the cost of board and lodgings. The charge passed onto parents/carers cannot exceed actual cost.

- Parents will be exempt from board and lodging costs if they can prove that they are in
- receipt of one or more of the following benefits:
- 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 that 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 – if they apply on or after 1 April 2018, their household income must be
- less than £7,400 a year (after tax and not including any benefits they receive)

Trips and Visits beyond the school day
Where a visit has taken place outside of the school day (at least 50% of the trip based on the school day divided into two sessions) and where the work undertaken is not an integral part of the examination course / curriculum, the trip is classed as optional and parents/carers will be expected to meet the full costs of the trip.

Charges for these trips will include, but are not limited to:

- Travel and transport costs,
- Meals and food,
- Board and lodgings,
- Materials, books, instruments and other equipment,
- Administration costs incurred in arranging the visit,
- Supply teachers to cover for teachers accompanying pupils during the visit,
- Insurance costs,
- Entrance fees,
- Activity fees.

Musical instrument tuition
Music tuition is the only exception to the rule that all education provided during school hours must be free. The Charges for Music Education (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 learner's parents/carers.

If not charged directly by the Local Authority Music Service the relevant school will charge for music tuition, either individually or part of a group, where the lesson is not considered to be part of the curriculum and is at the request of parents/carers, even if the lesson takes place during school hours. The amount charged is determined by the cost to the school of providing the tuition. The charge will not exceed the actual cost.

Practical subject charge
Voluntary contributions will be requested to cover the cost of materials and ingredients in practical subjects where parents/carers indicate that they wish to receive the finished article. Parents/carers and learners will be informed in advance of the lessons of the costs involved. Where parents/carers do not wish to make such a contribution, the product produced by the learner will be recycled, i.e. the learner will not be able to take the product home.

Public examinations
No charge will be made in respect of the entry of a registered learner at a school for an examination for which the school agrees the learner should be entered.

Charges will be applied for the entry of a learner for an examination for which they have not been prepared by the school, or for entry to an examination against the advice of the school.

Where a learner fails to sit an examination for which they have been entered without good reason/ ill health, parents/carers will be expected to meet the cost of the examination entry.

Parents/carers seeking to have an examination paper remarked, where the remark is not supported by the school, will be required to pay the remark fee prior to the remark being requested. If the new grade exceeds the original grade then this fee will be refunded as no charge will be levied by the examination board.

Loss of / damage to Trust property
Parents/carers will be expected to meet the cost of repairing or replacing any Trust property damaged or destroyed by a learner or their parents, or any fines to be paid by the Trust as a result of the actions of a learner. A charge will also apply for loss of or damage to Trust property (including books and equipment) placed under the care of the learner.

Fundraising and sponsorship
General fundraising and sponsorship from a variety of sources may be used to allow additional activities to take place. Any fundraising activity will make the purpose of the fundraising clear to those who may wish to contribute.
Any fundraising or sponsorship income received will not be payable or returnable to individual learners should the activity not go ahead. Reasonable attempts should be made to return the funds to donors where possible and practical if the activity is unable to happen.

Private lettings
Charges will be made for the use of the Trust's facilities by private individuals or external organisations at a rate to be determined annually by the Trust. Facilities will only be let when they are not needed for the purpose of education during that time.

6 Voluntary Contributions

Voluntary contributions may be requested for any activity, whether during or outside school hours, residential or non-residential. Learners whose parent/carer is unable to contribute will not be prevented from participating in an activity that takes place during school time if the activity goes ahead.

In any request for voluntary payments it must be clear from the terms in which it is made that:

- There is no obligation to make a contribution,
- Learners will not be treated differently according to whether or not their parent/carer contributed to the planned activity,
- If there are insufficient contributions received to cover the ~~cost~~ requirement of including all learners who wish to participate, the activity will not go ahead.

Where an activity takes place outside of school hours and does not form part of the curriculum or examination syllabus, this is classed as an optional extra and parents/carers will be asked to meet the full cost of these activities.

7 Remission of Charges

In order to remove financial barriers from disadvantaged learners, the Trust has determined that some activities and visits where charges can legally be made may be offered at no charge or a reduced charge to parents/carers in particular circumstances.

Qualifying for applying for remission of charges
Learners in receipt of Free School Meals or where the school is in receipt of Pupil Premium Grant for that learner may apply for remission of charges.

Parents/carers may also apply for remission of charges if they are in receipt of the following benefits:

- 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 State Pension Credit,
- Child Tax Credit (provided not also in receipt of 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 ceasing to qualify for Working Tax Credit,
- Universal Credit – if applied on or after 1 April 2018, household income must be less than £7,400 per annum after tax and not including any benefits received

Compulsory activities & visits taking place during school hours
Where parents/carers are in receipt of any of the benefits listed above, the Trust will observe its statutory duty to remit in full the cost of board and lodgings for any residential activity deemed to take place within school hours.

In order to remove financial barriers from disadvantaged learners, the Trust has determined that some activities and visits where charges can legally be made may be offered at no charge or a reduced charge to parents/carers in particular circumstances.

Optional extras
Application for remission from charges for optional extras will be considered for learners who qualify under the guidelines set out.

Parents/carers meeting these criteria may apply, in confidence to the Headteacher, at the learner's school for the remission of such charges.

Success of applications for remission of charges will depend upon the parents/carers fulfilling the criteria and the availability of funding within the school.

Other hardship cases
Parents/carers who do not qualify for applying for remission of charges under the guidelines set out above may also apply for remission of charges in the following cases:
- Specific circumstances have caused temporary hardship,
- Recently moved into hardship but not yet receiving the benefits listed
- Any other justifiable reason.

Parents/carers may apply in confidence to the Headteacher at the learner's school.

Applications will be considered on a case-by-case basis by the Headteacher in conjunction with the Finance Business Partner.

8 School Trip Refunds

- All initial deposits for school trips will be non-refundable. Parents/carers should be informed of this when they are provided with initial information about the trip.

- In the event that a school has to cancel a trip due to foreseen circumstances, parental contributions will be refunded. In the event that a trip is cancelled by a party other than the school due to unforeseen circumstances, it is at the school and Director of Finance's discretion as to whether a refund is given to parents.

- In the event that a trip is postponed due to unforeseen circumstances, monies paid will be carried forward until the trip takes place. Parents/carers who do not wish their child to take part in the re-arranged trip will be eligible for a refund, excluding the initial deposit.

- In the event that a learner or their parents/carers cancel their place on a trip, or a learner cannot attend a trip at short notice (e.g. due to illness) it is at the discretion of the Director of Finance as to whether a refund is given, taking into account the reason for cancellation, whether the school will be reimbursed for the learner's place on the trip and whether the place can be offered to another learner.

- In the event that a learner is no longer on roll at a Trust school then they cease to be a pupil of the Trust and therefore can no longer access Trust trips even if a place has been arranged and monies have been paid. This is due to fundamental changes in the safeguarding responsibilities, duty of care and supervision arrangements and emergency procedures which are all designed around current pupils for whom we retain an ongoing educational and welfare responsibility. The Trust will repay any funds already paid that are refundable but will not compensate any non-refundable funds already paid or losses incurred as a consequence".

- In the event of changes to the law, regulatory advice or Government guidance if the learner's attendance on the school trip would contravene any new or amended law, regulatory advice or Government guidance or if, in the opinion of the Trust, the learner's attendance on the school trip would cause health, safety or safeguarding concerns, the Trust has the right to cancel a learner’s attendance on any school trip. In such circumstances the Trust will repay any funds already paid that are refundable but will not compensate any non-refundable funds already paid or losses incurred as a consequence.

- Where a learner or their parents/carers have previously cancelled a place on a trip, the school has the right to refuse the learner to attend future trips and visits.

Once trip arrangements have been booked and confirmed, if contributions exceed the total cost of the trip, a refund will be given where the excess is greater than £5 per pupil.