A8

Boroughbridge High School and King James's School Federation

POLICY STATEMENT

Charging and Remission Policy

Policies last reviewed (date)	March 2026
Ratified by Governors (date)	September 2026
Next policy review due (date)	September 2027
Due for review by Governors (date)	September 2027
Staff Lead	Business Manager

MISSION STATEMENT:

This policy will support the school by being reflective of the Governors' direction and School's development plan. It will be used in an efficient and effective manner by recognising that a broad variety of additional activities, such as clubs, trips and residential experiences can make a valuable contribution to pupils' personal and social education.

Significant revisions since the last review:
Additional information from the LA Template added into Sections 1 and 2.
New Section 5 deliberate damage

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1. Introduction

The Federation recognises that a broad range of additional educational activities, including clubs, educational visits, trips and residential experiences, can make a valuable contribution to pupils' personal, social and educational development.

The Federation aims to provide a broad and balanced curriculum together with a programme of optional activities which enhances pupils' educational experience.

The purpose of this policy is to:

- ensure that charging arrangements are lawful, transparent, consistent and proportionate;
- clearly identify activities and circumstances for which the Federation will not charge;
- identify circumstances in which voluntary contributions may be requested;
- identify activities and services for which charges may lawfully be made;
- set out arrangements for remission, reduction or support where payment would cause financial hardship;
- ensure that no pupil is unfairly disadvantaged because of their family's financial circumstances;
- provide parents/carers with clear information about how charges have been calculated;
- establish consistent arrangements for payment, refunds, cancellations, arrears and exceptional circumstances; and
- ensure that decisions relating to charging and remission are made fairly and with due regard to equality and individual circumstances.

This policy has been developed with reference to the Education Act 1996, Department for Education guidance on charging for school activities, relevant Local Authority guidance and the Equality Act 2010. The statutory framework continues to apply to maintained schools and academies through the relevant legal and funding arrangements.

The policy applies to both schools within the Federation.

The policy will be reviewed at least annually by the Finance Committee and submitted for approval in accordance with the Federation's scheme of delegation. It will also be reviewed sooner where there is a significant change in legislation, DfE guidance, Local Authority guidance or Federation arrangements.

The Headteachers are responsible for ensuring that staff understand and correctly apply this policy. The Business Manager is responsible for maintaining appropriate administrative and financial controls.

2. Charging Principles

2.1 Activities provided during the school day

The Federation will not charge for education provided wholly or mainly during school hours where charging is prohibited by law.

This includes the provision of:

- teaching forming part of the National Curriculum;
- religious education;
- materials, books, instruments and equipment required for such education; and
- transport required to take pupils between the school and an educational activity where the law requires that transport to be provided without charge.

The Federation will not make a compulsory charge simply because an activity takes place during the school day.

Where an activity has additional costs and the law permits only voluntary contributions, the Federation may request voluntary contributions in accordance with Section 2.2.

2.2 Voluntary Contributions

The Federation may request voluntary contributions from parents/carers towards activities taking place during the school day where additional costs are incurred.

Any request for a voluntary contribution must clearly state:

1. that the contribution is voluntary;
2. the amount requested and how it has been calculated;
3. what the contribution will fund;
4. whether the activity is dependent upon sufficient contributions being received;
5. that pupils will not be excluded from the activity because their parent/carer has not contributed; and
6. the arrangements for accessing financial assistance where appropriate.

Parents/carers must not be pressured, directly or indirectly, into making a voluntary contribution. Where insufficient contributions are received to make an activity financially viable, the Federation may cancel, postpone, modify or replace the activity. Parents/carers will be informed as soon as reasonably practicable.

The Federation will not use payment information or contribution records to disadvantage a pupil in relation to participation in an activity.

2.3 Optional activities outside the school day

The Federation may charge for optional activities provided wholly or partly outside the school day where permitted by law.

Examples may include:

- optional educational visits;
- theatre, sporting or cultural visits;
- optional clubs and activities;
- breakfast clubs and after-school activities;
- board and lodging on residential visits;
- transport where a charge is legally permitted;
- optional instrumental or vocal music tuition; and
- other optional extras which fall within the statutory charging framework.

Before a charge is requested, parents/carers will be provided with sufficient information to understand:

- the nature and purpose of the activity;
- the total cost;
- what is included within the charge;
- the payment deadline;
- whether instalments are available;
- arrangements for cancellation or withdrawal;
- arrangements for financial assistance or remission; and
- any circumstances in which a refund may be available.

2.4 Calculation of charges

Where the Federation makes a charge, it will calculate the charge in accordance with the statutory framework.

Charges will normally be based on the actual cost of providing the activity, divided appropriately among participating pupils.

The Federation will not use charges for one activity to subsidise unrelated pupils or activities unless this is lawful and has been expressly approved.

Where practicable, the Federation will seek value for money when procuring activities, transport, accommodation and other services.

The Federation will retain sufficient records to demonstrate how significant charges have been calculated. Charges will not be set at a level which knowingly exceeds the lawful cost recoverable for the activity.

2.5 Activities partly during and partly outside the school day

Where an activity takes place partly during and partly outside the school day, the Federation will determine whether a charge may lawfully be made by applying the relevant statutory rules.

Parents/carers will be informed in advance of:

- the proportion of the activity taking place during and outside the school day;
- whether a charge will apply;
- how the charge has been calculated; and
- the availability of remission or financial assistance.

3. Residential Visits

The Federation may charge for board and lodging on residential visits where permitted by law.
The charge for board and lodging will not exceed the actual cost.

Where a pupil is eligible for statutory remission, the Federation will remit the relevant board and lodging costs in accordance with current legislation and DfE guidance.

The Federation will ensure that eligible parents/carers are informed of the availability of remission before payment becomes due.

Where a residential visit includes other elements for which a charge may lawfully be made, those elements will be separately identified where appropriate.

Eligibility for statutory remission will be assessed against the benefits and income criteria applicable at the time of the activity. The Federation will avoid reproducing outdated financial thresholds in this policy and will apply the current statutory/DfE criteria in force at the time.

4. Music Tuition

Instrumental and vocal tuition may be charged for where permitted by the Music Tuition regulations. Charges will not be made where the tuition is an essential part of the National Curriculum or where another statutory exemption applies.

Charges for optional music tuition will not exceed the lawful cost of providing the tuition.

Where external providers deliver tuition, the Federation will make clear to parents/carers:

- who provides the tuition;
- the cost;
- payment arrangements;
- cancellation arrangements; and
- the process for requesting financial assistance.

The Federation may consider remission or partial remission of music tuition charges in cases of financial hardship, subject to the arrangements in Section 5.

5. Remissions and Financial Assistance

5.1 Principles

The Federation is committed to ensuring that financial circumstances do not unnecessarily prevent pupils from accessing educational experiences.

Remission means the full or partial reduction of a charge which would otherwise be payable.

Remission may be:

- required by law;
- available under this policy because of financial hardship; or
- granted in exceptional circumstances at the discretion of the Headteacher or Governing Body.

The Federation will apply remission arrangements consistently and fairly.

A decision to grant or refuse remission will not affect a pupil's access to education, their relationship with staff, or their treatment within school.

5.2 Statutory remission

Where legislation requires charges to be remitted, the Federation will provide the remission without requiring parents/carers to make a discretionary case.

This includes statutory remission arrangements applying to eligible pupils in respect of board and lodging on residential activities.

The Federation will use the eligibility criteria applicable at the time of the activity rather than relying on historical thresholds reproduced in this policy.

5.3 Discretionary hardship support
In addition to statutory remission, the Federation may provide full or partial financial assistance where payment would cause significant financial hardship.

Hardship support may be considered where:

- the family is experiencing temporary financial difficulty;
- there has been a significant change in household income or circumstances;
- the family has unavoidable exceptional expenditure;
- a pupil would otherwise be unable to access a significant educational opportunity; or
- there are other exceptional circumstances which the Headteacher considers relevant.

The Federation may request reasonable evidence to support an application. Such evidence will be proportionate to the decision being made.

Examples of evidence may include evidence of benefits, household income, exceptional expenditure or other relevant financial circumstances.

The Federation will not normally require families to disclose unnecessary personal financial information.

5.4 Application process
Parents/carers who believe they may qualify for financial assistance should contact the school as early as possible and, where practicable, before the activity takes place.

Applications will be treated confidentially.

The school will provide a straightforward process for requesting support and will not require parents/carers to discuss their financial circumstances publicly.

Where possible, families will be encouraged to apply before a payment deadline so that the school can plan appropriately.

The Federation may also identify families who may benefit from support and, where appropriate, invite them to discuss available assistance.

5.5 Decision-making
Applications for discretionary remission will normally be considered by the Headteacher or a delegated senior member of staff in accordance with criteria approved by the Federation.

Where the circumstances are particularly significant, exceptional or financially material, the Headteacher may refer the decision to the Business Manager, Finance Committee or Governing Body as appropriate.

Decisions will take account of:

- the nature and educational importance of the activity;
- the amount of the charge;
- the family's circumstances;
- the evidence provided;
- the availability of school or other funding;
- whether partial rather than full remission is appropriate; and
- the need to apply the policy consistently.

The Federation will maintain an appropriate confidential record of decisions to support consistency and accountability.

A decision to provide assistance in one case will not automatically establish an entitlement in another case.

5.6 Level of assistance

Depending on circumstances, support may include:

- full remission;
- partial remission;
- an agreed reduced charge;
- an instalment arrangement;
- an extended payment period; or
- signposting to other appropriate sources of financial support.

The Federation will consider the most appropriate form of assistance rather than assuming that full remission is the only available option.

5.7 Instalment and payment arrangements

Where a parent/carer is unable to meet a charge in one payment, the school may agree an instalment arrangement.

An instalment arrangement will not normally increase the total charge.

Families experiencing difficulty paying should be encouraged to contact the school before an account becomes overdue.

The Federation will seek to resolve payment difficulties constructively and sensitively.

No pupil will be publicly identified as having outstanding charges.

5.8 Confidentiality
Information relating to a family's financial circumstances will be treated confidentially and accessed only by staff who need the information to administer the policy.

Staff responsible for supervising an activity will not routinely be informed whether a pupil has received remission or financial assistance unless this information is necessary for safeguarding, welfare, logistical or other legitimate purposes.

5.9 Review or appeal
Where a parent/carer believes that a decision has not been made in accordance with this policy, they may request that the decision is reviewed.

A review should normally be submitted in writing within 10 school days of the decision and should explain the grounds for review.

The review will normally be undertaken by a person who was not the original decision-maker, where reasonably practicable.

The review will consider whether:
- the policy was applied correctly;
- relevant information was taken into account;
- irrelevant considerations influenced the decision; and
- the decision was reasonable and proportionate.

The outcome of the review will be communicated to the parent/carer.

This review process does not prevent a parent/carer from using the Federation's formal complaints procedure where appropriate.

6. Refunds, Cancellation and Unavoidable Changes
The Federation recognises that activities may sometimes be cancelled or that pupils may withdraw for legitimate reasons.

Refunds will be considered on a case-by-case basis, taking account of:
- whether the school has already incurred an irrecoverable cost;
- the terms and conditions of external providers;
- whether insurance applies;
- whether the pupil's place can be reallocated;
- the reason for cancellation or withdrawal; and
- any statutory requirements.

Where the Federation cancels an activity and is able to recover the relevant costs, the recovered amount will normally be returned to parents/carers.

Where the Federation has incurred non-refundable costs, it will explain the position clearly to parents/carers.

The Federation will not retain sums greater than those lawfully and reasonably due.

7. Charges for Deliberate Damage

The Federation will take proportionate action where school property is damaged deliberately. Accidental damage will not normally result in a charge.

Where deliberate or reckless damage occurs, the Federation may seek payment towards the reasonable cost of repair or replacement.

Before seeking payment, the school will consider:

- the evidence establishing responsibility;
- the pupil's age and understanding;
- whether the damage was deliberate or reckless;
- the extent and actual cost of the damage;
- the circumstances in which the incident occurred;
- any relevant special educational needs or disability;
- the family's circumstances where appropriate; and
- whether an alternative educational or disciplinary response is more appropriate.

Any charge will be reasonable, proportionate and based on the actual or reasonably estimated cost of repair or replacement.

The Federation will not automatically charge the full replacement cost where repair is reasonably possible. A charge for deliberate damage may be considered alongside disciplinary action under the Behaviour Policy, but financial liability will not be used as a substitute for appropriate pastoral or disciplinary support.

Where the damage may be linked to a pupil's special educational needs or disability, the Federation will consider its obligations under the Equality Act 2010 and any reasonable adjustments that may be required.

8. Lettings and External Organisations

Where school premises or facilities are let to external organisations, charges will be determined in accordance with the Federation's lettings arrangements.

External organisations which operate activities on school premises may charge parents/carers directly where they are legally entitled to do so.

The Federation will make clear, where relevant, whether a charge is imposed by the school or by an external provider.

The Federation will not accept responsibility for charges imposed independently by an external organisation unless it has expressly agreed to do so.

9. Financial Management and Accountability

All income received under this policy will be recorded and accounted for in accordance with the Federation's financial procedures.

The Federation will maintain appropriate records of:

- charges raised;
- payments received;
- voluntary contributions;
- remission and hardship awards;
- refunds;
- outstanding balances; and
- significant decisions made under this policy.

The Finance Committee will monitor the operation of the policy as part of its financial oversight responsibilities.

Significant trends in unpaid charges, remission requests or financial hardship will be reported to the appropriate committee without identifying individual families unless there is a legitimate reason to do so.

10. Communication with Parents/Carers

Before a chargeable activity is confirmed, parents/carers will receive clear information about:

- the purpose and nature of the activity;
- the total charge;
- how the charge has been calculated;
- what the charge includes;
- payment arrangements and deadlines;
- whether instalments are available;
- eligibility for statutory remission;
- the availability of discretionary hardship assistance;
- cancellation and refund arrangements; and
- whom to contact if payment presents a difficulty.

The Federation will ensure that information about financial assistance is communicated sensitively and does not stigmatise pupils or families.

The current policy will be published on the Federation's website as required.

11. Equality, Inclusion and Accessibility

The Federation will apply this policy consistently and in accordance with the Equality Act 2010.
Charging arrangements will not be used in a way which unlawfully discriminates against pupils or families.
When planning chargeable activities, the Federation will consider accessibility and reasonable adjustments from the outset.

Particular consideration will be given to pupils with special educational needs and disabilities, looked-after children and pupils whose circumstances may create barriers to participation.

The Federation will seek to ensure that financial assistance and remission arrangements are accessible to families who need them.

North Yorkshire Council guidance emphasises that school activities should be available to pupils irrespective of special educational or medical needs and that equality considerations should be addressed from the outset when policies and significant decisions are developed.

12. Complaints

Any concern about the operation of this policy should initially be raised with the relevant Headteacher or Business Manager.

Where the concern cannot be resolved informally, parents/carers may use the Federation's formal Complaints Policy.

A complaint about a charging decision will be considered separately from any recovery action where appropriate, so that the complaints process can operate fairly.

13. Monitoring and Review

The Finance Committee will monitor the implementation of this policy annually.

The review will consider:

- whether charges remain lawful and reasonable;
- whether charges accurately reflect costs;
- the number and value of remission awards;
- requests for hardship assistance;
- outstanding balances;
- refund and cancellation issues;
- equality and accessibility considerations;
- feedback from parents/carers;
- relevant complaints; and
- changes to legislation, DfE guidance or Local Authority guidance.

The policy will be updated where necessary to reflect changes in statutory requirements or Federation practice.

The governing body will retain overall responsibility for ensuring that the Federation has an effective charging and remissions policy. Current government guidance confirms that schools must publish their charging and remissions arrangements.

Appendix 1 – Summary of Charging Arrangements

Activity/service	Charging position
National Curriculum education during school hours	No charge where prohibited by law
Religious education	No charge where prohibited by law
Required materials/equipment for education during school hours	No charge where prohibited by law
Voluntary contributions for activities during the school day	Permitted where contributions are genuinely voluntary
Optional activities outside the school day	Charge permitted where lawful
Residential board and lodging	Charge permitted, subject to statutory remission
Optional instrumental/vocal music tuition	Charge permitted where lawful
Breakfast/after-school/extended-day provision	Charge permitted where lawful
Deliberate damage	Reasonable charge may be sought following consideration of circumstances
Accidental damage	Normally no charge
External provider charges	Provider may charge where independently entitled to do so

Appendix 2 – Key Principles for Staff

Staff administering charging arrangements should remember:

1. A charge must have a lawful basis.
2. Voluntary contributions must remain genuinely voluntary.
3. A pupil must not be excluded from an activity solely because their parent/carer has declined a voluntary contribution.
4. Charges should be transparent and based on lawful costs.
5. Parents/carers should be told about financial assistance before payment becomes a barrier to participation.
6. Financial hardship should be handled confidentially and sensitively.
7. Remission decisions should be consistent, proportionate and recorded.
8. Special educational needs, disability and equality considerations must be taken into account.
9. No pupil should be publicly identified because their family cannot pay.
10. Where staff are uncertain whether a charge is lawful, advice should be obtained from the Business Manager before the charge is requested.