



# The Legacy Learning Trust

## Charging

| Status & Review Cycle              | Term        | Year      |
|------------------------------------|-------------|-----------|
| Last Review<br>Date/Policy Adopted | Autumn Term | 2025-2026 |
| Next Review Date                   | Autumn Term | 2026-2027 |
| Lead                               | CFOO        |           |

## Control Sheet – Charging

|                               |   |
|-------------------------------|---|
| <b>Original date approved</b> | New policy implemented Summer 2023-2024 |
| <b>Current date approved</b>  | Autumn Term 2025-2026                   |
| <b>Approved by</b>            | REF Committee                           |
| <b>Date of next review</b>    | Autumn Term 2026-2027                   |
| <b>Policy owner</b>           | CFOO                                    |
| <b>Policy location</b>        | TLLT Shared                             |
| <b>Target group</b>           | All staff                               |

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## 1. Policy Aims

Our Trust aims to:

- Have robust, clear processes in place for charging and remissions
- Clearly set out the types of activity that can be charged for and when charges will and will not be made
- Offer a range of activities and visits whilst minimising the financial barriers that may prevent some pupils from taking full advantage of these opportunities

## 2. Legislation and guidance

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.

## 3. Definitions

- **Charge:** a fee payable for specifically defined activities
- **Remission:** the cancellation of a charge which would normally be payable

## 4. Where charges cannot be made

Below we set out what we **cannot** charge for:

### 4.1 Education

- Admission applications
- 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
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the school
  - Religious education
- Instrumental or vocal tuition, for pupils learning individually or in groups, unless the tuition is provided at the request of the pupil's parent/carer
- Entry for a prescribed public examination if the pupil has been prepared for it at the school
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school
  - 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.

### 4.2 Transport

- Transporting pupils to or from the academies' premises, where the local authority (LA) has a statutory obligation to provide transport

- Transporting pupils to other premises where the Trust or LA 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 at the school
- Transport provided in connection with an educational visit

#### 4.3 Residential 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:
  - The National Curriculum
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the school
  - Religious education

#### 4.4 School Meals

- The academy **does not charge** for school meals where the pupil is eligible for free school meals
- Pupils who are not entitled to free school meals **will** be charged. For school charges in each of the academies, please refer to their websites.

### 5. Where charges can be made

Below we set out what we **can** charge for:

#### 5.1 Education

- Any materials, books, instruments or equipment, where the child's parent/carer wishes the child to own them
- Optional extras (see section 5.2)
- Music and vocal tuition, in limited circumstances (see section 5.2)
- Certain early years provision
- Community facilities
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the school **and** the pupil fails, without good reason, to meet any examination requirement for a syllabus

#### 5.2 Optional extras

We are able to charge for activities known as 'optional extras'. In these cases, schools can charge for providing materials, books, instruments or equipment. The following are optional extras:

- Education provided outside of school time that is not part of:
  - The National Curriculum
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the school
  - Religious education
- Examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the school
- Transport (**other than that outlined in section 4.2**)
- Board and lodging for a pupil on a residential visit

- Extended day services offered to pupils (such as breakfast clubs, after-school clubs, tea and supervised homework sessions)

When calculating the cost of optional extras, an amount **may** include the following:

- Any materials, books, instruments or equipment provided in connection with the optional extra
- The cost of buildings and accommodation
- Staffing
- 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

Any charge made in respect of individual pupils will not be greater than the actual cost of providing the optional extra activity, divided equally by the number of pupils participating.

Any charge will not include an element of subsidy for any other pupils who wish to take part in the activity but whose parents/carers are unwilling or unable to pay the full charge.

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.

Parental agreement is necessary for the provision of an optional extra that is to be charged for.

### 5.3 Music tuition

Schools can charge for vocal or instrumental tuition provided either individually or to groups of pupils, provided that the tuition is provided at the request of the pupil's parent/carer.

Charges may not exceed the cost of the provision, including the cost of the staff giving the tuition.

Charges cannot be made:

- If the teaching is an essential part of the National Curriculum
- If the teaching is provided under the first access to the Key Stage 2 instrumental and vocal tuition programme
- For a pupil who is looked after by a local authority

### 5.4 Residential visits

We **will charge** for board and lodging on residential visits, but the charge must not exceed the actual cost.

## 6. Voluntary contributions

As an exception to the requirements set out in section 4 of this policy, the academy can ask for voluntary contributions from parents/carers to fund activities that would not otherwise be possible.

**Where it is intended that an activity is to be funded by voluntary contributions, the Headteacher will ensure that the parents/carers are made aware that:**

- There is no obligation for parents/carers to make any contribution, and no child will be excluded from an activity if their parents/carers are unwilling or unable to pay. Pupils whose parents/carers are unwilling or unable to will still be given an equal chance to participate in the activity.
- If the school is unable to raise enough funds for an activity or visit, then it will be cancelled.

## 7. Activities we charge for

The school will charge for the following activities (this list is non-exhaustive)

| Activity  | Note   |
|---|--|
| Board and lodging on residential trips  | Information about activities and costs to be distributed to parents/carers well in advance of any trip,    |
| Materials, books, instruments or equipment where the child's parents wishes them to own them                |  |
| Vocal and musical instrumental tuition  | Charges may not exceed the cost of the provision   |
| Re-sits for public examinations where no further preparation has been provided by the school                |  |
| Examination fees, where a student fails for good reason to sit an exam                                      | After consultation with parents/carers   |
| Any other education, transport or examinations where no further preparation has been provided by the school |  |
| Any other education, transport or examinations fee unless charges are specifically prohibited               |  |
| Breakages, repairs and replacements as a result of damage caused wilfully or negligently by the student     | Charges will be made after consultation with parents and will not exceed total repair/replacement costs    |
| Extra curricular activities and clubs   | Charges to cover the additional costs incurred by the school, beyond any element covered by public funding |
| Any extended school activity, including community facilities  | Charges to cover the additional costs incurred by the school, beyond any element covered by public funding |
| Pupil lunches   | Unless entitled to Free School Meals   |

Any other charges specific to an individual school in the Trust may occur and are fully communicated with parents/carers prior to charging.

## 8. Refunds

- 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.
- In all cases of withdrawal, either voluntarily or otherwise, applications should be made in writing to the Headteacher. If approved, refunds will be processed via the original method of payment.
- 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.

## 9. Damages to property and breakages

- 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.
- 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.

## 10. Remissions

In some circumstances, the school may not charge for items or activities set out in sections 5 and 7 of this policy. This will be at the discretion of the governing board and will depend on the activity in question.

### 10.1 Remissions for residential visits

Parents/carers who can prove they are in receipt of any of the following benefits will be exempt from paying the cost of board and lodging for residential visits:

- 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 you're 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 4 weeks after you stop qualifying for Working Tax Credit
- Universal Credit – if you apply on or after 1 April 2018, your household income must be less than £7,400 a year (after tax and not including any benefits you get)

## 11. Practice for school to school and educational support

- School to school and educational support is brokered by the Trust School Improvement team. Charges for school to school support, or support to improve education provision, will be made by TLLT to the supporting school/organisation.
- Charges are at the discretion of the CEO, on a case by case basis, with the following criteria taken into account:
- Value of resources and intellectual capital
  - Copyright law
  - Cost of time spent by staff members to support other schools, including cover costs
  - Nature of business of the receiving organisation

### Mechanism of payments

- In cases where charges are to be levied, schools/organisations must be advised in advance.
- Charges will be invoiced after the support has taken place and then normal Trust procedures for debtor management will apply.



## 12. Practice for community programme

### Schedule of charges

- A schedule of charges is produced and updated annually to reflect the level of charge for the programme of activity on offer. This includes differentiation between activities, spaces for hire and membership status where applicable.
- All bookings will be confirmed and charges confirmed at the time of booking.

### Mechanism of payments

- Individual activities must be paid for at the relevant school prior to the activity taking place.
- Block bookings and events are invoiced following the event and all debtors are the responsibility of the school.

## 13. Complaints

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

## 14. Monitoring arrangements

This policy will be reviewed by the CFOO annually.

At every review, the policy will be approved by the REF Committee.

| Other linked Policies/Associated Documents/Procedures       |
|---|
| Individual school meal pricing procedures (school websites) |