



Waterton
Academy Trust

Charging and Remissions Policy



Contents

Introduction	2
Legislation and guidance	2
Aims	2
Roles and Responsibilities.....	2
Where Charges Cannot be Made.....	3
Where Charges Can be Made	3
Fee-based Activities.....	6
Remissions	6
Refunds.....	6
Document Detail	7
Version Control	7

Introduction

The Trustees of Waterton Academy Trust recognise the valuable contribution that a wide range of additional activities, including trips, clubs and residential experiences, can make towards pupils' all-round education and their personal and social development. The Trustees aim to promote and provide such activities as part of a broad and balanced curriculum for the pupils within the Accord academies, and as additional optional activities. Throughout this policy, the term "parents" means all those having parental responsibility for a child.

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 and articles of association.

It's also based on guidance from the DfE on [statutory policies for schools and academy trusts](#).

Aims

Waterton Academy Trust aims to:

- ensure that pupils can access the academy curriculum without cost to their families unless it is agreed, as per section 9 of this policy, that charging will apply;
- ensure that any extracurricular activities, which are run by external bodies, or which incur an additional cost, are only charged at cost;
- ensure that remissions are implemented in accordance with the relevant criteria; and
- ensure that any additional income generated from external sources is utilised for the benefit of the pupils.

Roles and Responsibilities

The Trust Board

The Trust Board has overall responsibility for approving the charging and remissions policy and for monitoring the implementation of this but are advised by Local Hub Boards.

The Chief Operations and Financial Officer

The COFO is responsible for ensuring staff are familiar with the charging and remissions policy, and that it is being applied consistently.

Staff

Staff are responsible for:

- implementing the charging and remissions policy consistently; and

- seeking advice from the finance team if they are unsure about whether or not the policy applies.

The finance team will provide central and academy staff with appropriate training in relation to this policy and its implementation.

Parents

Parents are expected to notify their school office of any concerns or queries regarding the charging and remissions policy.

Where Charges Cannot be Made

This guidance states that charges cannot be made for the following, however a voluntary contribution may be requested at the discretion of the Headteacher where applicable:

- an admission application to any academy;
- education provided during academy hours (including the supply of any materials, books, instruments or other equipment),
- education provided outside of academy hours if 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 academy, or part of 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;
- entry for prescribed public examination, if the pupil has been prepared for it at the academy; and
- examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the academy.

Where Charges Can be Made

The Trustees of Waterton Academy Trust reserve the right to make a charge for the following, as set out in the sections below:

- educational visits;
- extracurricular activities outside of academy hours;
- provision of additional instrumental tuition as arranged through the academy music department;
- materials and equipment;
- examinations;
- wilful damage; and
- lettings.

The school can ask for voluntary contributions from parents to fund activities which would not otherwise be possible. Some activities for which individual activities may ask parents for voluntary contributions include:

- school trips, including transportation;
- after school activities (other than wraparound care) which are staffed by school staff; and

- school discos and similar events.

There is no obligation for parents to make any contribution, and no child will be excluded from an activity if their parents are unwilling or unable to pay.

If schools are unable to raise enough funds for an activity or visit then it may be cancelled.

Optional extras

Each Academy will decide when it is necessary to charge for optional activities and the level of those charges. 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 will not therefore include any element of subsidy for any other pupils wishing to participate in the activity whose parents are unwilling or unable to pay the full charge.

When 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 (including supply teachers engaged specifically to provide the optional extra).
- 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.

Educational Visits

All Waterton academies offer a range of educational visits and trips to pupils, both inside out outside of academy hours.

For visits taking place wholly during academy hours, the academy may ask parents for voluntary contributions to meet the costs. Although there is no obligation to contribute, unless sufficient voluntary contributions are received, the Academy may need to consider whether the visit is financially viable. Any insurance costs will be included in charges made for trips and activities.

The Trust is committed to ensuring fair access and treatment of all pupils, and this means ensuring that no child is excluded from an activity because the parents or carers of that child are unwilling or unable to pay.

As a general principle, visits taking place outside of academy hours are considered optional and would normally be funded wholly by parents.

The Headteacher can charge parents for board and lodging on residential visits as well as the full cost when a visit is deemed to be an 'optional extra, however the Headteacher may offer to remit either part or full cost of the board and lodging for any residential activity which:

- takes place during academy hours or;
- is not an optional extra.

An optional extra is defined as:

- falls wholly or mainly outside academy hours, i.e. a skiing holiday during the academy holidays.
- does not form part of the national curriculum or the statutory requirements for religious education;
- is not part of a syllabus towards a prescribed public examination.

Extra-Curricular Activities

The Trustees reserve the right to charge for the cost of providing any optional extra-curricular activities that take place outside of academy hours, if run by an external body or which incur an additional cost.

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, and they do 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; and
- for a pupil who is looked after by a local authority.

Examinations

The Trustees may recover any fee in respect of the entry of a registered pupil at the academy for a public examination in any syllabus if for that examination either:

- the pupil fails without good reason to meet any examination requirements of that syllabus; or
- the pupil fails to sit any examination without good reason.

Wilful Damage

Where school property has been wilfully damaged by a pupil or parent, the school 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 school has been charged, the school may charge some or all of the cost to those responsible.

Whether or not these charges will be made will be the decision of the Headteacher.

Lettings

The Trust is committed to making its premises available for the benefit of the community and will recover the costs of the letting ie utility and caretaking costs.

Fee-based Activities

Waterton Academy Trust schools will charge for the following activities:

- wraparound care such as breakfast, after school and holiday provision;
- nursery hours which fall outside the funded early education entitlement on offer at the school;
- products such as water bottles and book bags which are available through the school office; and
- clubs which are run by external coaches or organisations.

For all chargeable activities, schools must keep a record of how charges are calculated and ensure that this information is available to parents. The charges for each activity will be determined by the Schools Leadership team and reviewed each year. Parents will be informed of the charges for the coming year in the summer term.


Remissions

In some circumstances, the school may not charge for items or activities set out in this policy. This will be at the discretion of the Academy Standards Committee but they may remit in full or in part the cost of any activity or equipment for groups of parents, for example, in the case of family hardship. The criteria for remissions are:

- 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 you're not also entitled to Working Tax Credit and the family's income does not exceed £16,190
- Universal Credit

Refunds

Charges and contributions are set to cover the anticipated costs. If the income from an activity exceeds the actual costs, the Academy will refund any surplus greater than £5 per student who contributed to the activity.

Document Detail			
Document Name:	Charging and Remissions Policy		
Version:	5		
Chief Officer Signature:			
Effective From:	01/03/2025		
Approved by:	Trust Board		
Approval Meeting Reference:	18/03/25		
Next Review Date:	01/03/2026		
Version Control			
Version	Date	Author	Change/Reference
2	Nov 18	P Knox	
3	Oct 20	P Knox	Formatting changes
4	Jun 23	P Knox	Policy re-write
5	Mar 25	P Knox	Minor changes to some wording and the order of paragraphs