



Charging and Remission Policy

School: Summerswood Primary School

Policy owner: Governing Body

Approved by: Chair of Governors – Laura Burt

Effective from: 1 September 2026

Review date: September 2027

1. Purpose

Summerswood Primary School is committed to providing a broad, balanced and inclusive education. The school recognises that educational visits, residential, clubs and other activities can make an important contribution to pupils' education and personal development.

The purpose of this policy is to:

- explain when the school may charge parents and carers;
- ensure charges are reasonable, transparent and lawful;
- provide a clear and equitable remission scheme;
- prevent a pupil from being disadvantaged because of their family's financial circumstances;
- explain how voluntary contributions and donations will operate;
- ensure that financial hardship is dealt with sensitively and confidentially.

The school will comply with the Education Act 1996, applicable regulations and current Department for Education guidance.

2. Principles

The school will:

1. Never charge for education that is required to meet the National Curriculum or statutory duties where legislation prohibits such charges.
2. Make clear in advance whether an activity is free, chargeable or dependent on voluntary contributions.

3. Never exclude a pupil from an educational activity simply because their parent or carer cannot afford a voluntary contribution.
4. Apply remission arrangements fairly and consistently.
5. Protect the confidentiality and dignity of families receiving financial assistance.
6. Use available school funding, including Pupil Premium where appropriate, in accordance with its conditions of grant and published strategy.
7. Review charges regularly to ensure they reflect actual and reasonable costs.

3. Education provided during school hours

The school will not charge for:

- admission applications;
- education provided during school hours;
- education provided outside school hours where it forms part of the National Curriculum, statutory religious education or preparation for a prescribed public examination;
- supply of materials, books, instruments or equipment required for the above education;
- transport provided by the school to facilitate education where a charge is prohibited by law.

Where an activity takes place wholly or partly outside normal school hours, the school will determine whether a charge may lawfully be made.

4. Educational visits and activities

The school may charge for activities that fall outside the statutory requirements for free education.

Charges may include, where permitted:

- board and lodging on residential visits;
- travel;
- entrance fees;
- specialist instruction;
- materials and equipment;
- insurance specifically relating to the activity;
- the proportionate cost of staff directly required to provide the activity where permitted;
- other costs that the school is legally entitled to recover.

Charges will normally be calculated on the basis of the actual cost of the activity. The school will not seek to make a profit from a compulsory charge.

Where an activity is dependent on voluntary contributions, this will be clearly stated.

5. Voluntary contributions

The school may ask parents and carers for voluntary contributions towards activities, visits and events.

The request will explain:

- the purpose of the contribution;
- the estimated total cost;
- the suggested contribution per pupil;
- that contributions are voluntary;
- that pupils will not be treated differently because their family has not contributed.

If insufficient contributions are received to enable an activity to proceed safely and within the school's available budget, the school may cancel or alter the activity. This will be communicated to parents and carers as soon as reasonably practicable.

6. Residential visits

Parents and carers may be charged for board and lodging on residential activities where the activity is not required to fulfil the National Curriculum or statutory duties.

Where a residential forms part of required curriculum provision, the school will apply the statutory rules concerning charges and remission.

The school will publish the expected cost as early as practicable and, wherever possible, provide a payment plan.

7. Music tuition

Where permitted by law, the school may charge for individual or small-group music tuition provided by a specialist teacher or external provider where the tuition does not form part of required curriculum provision.

Charges will be communicated before tuition begins.

The school will consider remission or subsidy for eligible families in accordance with Section 13 of this policy.

8. Clubs and activities

The school may charge for optional clubs and activities that are not part of the statutory curriculum.

Charges will normally cover the reasonable cost of:

- staffing;
- external instructors;
- equipment and materials;
- venue hire;

- transport;
- other directly attributable costs.

Where places are limited, the school will apply its published allocation arrangements fairly.

No pupil will be disadvantaged in compulsory education because they cannot afford an optional club.

9. Materials, ingredients and practical activities

Where permitted by law, the school may ask parents and carers to provide or pay for materials or ingredients for activities that result in a product that the pupil takes home.

The school will provide an appropriate alternative where necessary so that a pupil is not excluded from the educational activity because their family cannot afford the requested item.

10. Examination fees

The school will pay the examination entry fee where a pupil has been prepared by the school and enters an examination approved by the school.

Where a pupil fails to attend an examination without good reason, or requests an additional examination entry outside the school's normal provision, the school may recover costs where permitted.

The school will inform parents and carers of any potential charge before it is incurred.

11. Damage or loss of school property

The school may seek payment where school property has been damaged or lost through a pupil's deliberate or negligent behaviour.

The school will consider the circumstances of the incident and the family's ability to pay before requesting payment.

A charge will not be used as a punitive measure.

12. School meals and Free School Meals

The school will comply with current DfE Free School Meals guidance.

From the beginning of the 2026–27 academic year, children in households receiving Universal Credit are eligible for Free School Meals, subject to the applicable verification requirements.

There are two relevant categories:

12.1 Expanded FSM

Expanded FSM provides free school meals to pupils in households receiving Universal Credit who do not meet the income threshold for Targeted FSM.

This entitlement is for the meal itself.

12.2 Targeted FSM

Targeted FSM applies to pupils in households receiving Universal Credit with annual household earnings of **£7,400 or less**, subject to the applicable rules.

Targeted FSM eligibility is significant for additional disadvantage funding. Pupils in the Targeted FSM cohort may attract Pupil Premium, whereas pupils eligible only through Expanded FSM do not attract Pupil Premium on that basis.

The school will encourage eligible families to apply for FSM and will provide information about the application and verification process.

13. Remission and financial assistance

13.1 Statutory remission

Where legislation requires charges to be remitted for eligible pupils, the school will provide remission in accordance with the applicable statutory requirements.

13.2 School hardship assistance

In addition to statutory remission, the school will operate a discretionary **School Financial Assistance Scheme**.

The scheme is intended to support families experiencing financial hardship where a charge for an educational activity would otherwise create a significant barrier to participation.

Applications may be considered where a family:

- is experiencing significant financial hardship;
- has experienced a sudden reduction in income;
- is affected by redundancy, bereavement or another significant change in circumstances;
- has substantial unavoidable caring or housing costs;
- has circumstances that mean an otherwise affordable charge has become unreasonable;
- is not eligible for a particular benefits-based remission but nevertheless requires assistance.

The school may request reasonable supporting information, but will avoid unnecessary or intrusive evidence requirements.

13.3 Levels of assistance

Subject to available funds, the school may provide:

- **100% remission** where there is significant financial hardship;
- **75% remission** where substantial assistance is required;
- **50% remission** where partial assistance would enable participation;
- **25% remission** where a smaller subsidy would be sufficient;
- a payment plan where remission is not appropriate but spreading the cost would assist the family.

The school may also provide assistance with transport, essential equipment, educational visits and other approved educational costs where funds permit.

These percentages are guidelines rather than automatic entitlements.

13.4 Pupil Premium

Where a pupil is eligible for Pupil Premium, the school may use appropriate Pupil Premium provision to support access to educational opportunities in accordance with the school's Pupil Premium strategy and the DfE conditions of grant.

Pupil Premium is not an individual cash entitlement and will not automatically be used to pay every charge for an eligible pupil.

For 2026–27, DfE Pupil Premium rates include £1,550 per eligible primary-aged FSM/Ever 6 pupil and £1,100 per eligible secondary-aged FSM/Ever 6 pupil, with separate rates for previously looked-after and looked-after children.

13.5 Other vulnerable groups

The school will consider financial assistance for:

- looked-after children;
- previously looked-after children;
- children of service personnel where appropriate;
- pupils with SEND where an activity creates an additional unavoidable financial barrier;
- families receiving support through other statutory or charitable arrangements;
- families experiencing temporary financial hardship.

Service Pupil Premium is intended to support children of service families and is not itself restricted to pupils experiencing financial disadvantage.

14. Application for remission

Parents and carers who believe they require assistance should contact [School Office / Finance Office / designated member of staff].

Applications will be treated confidentially.

The school will normally ask for:

- the name and year group of the pupil;
- the activity or charge for which assistance is requested;
- a brief explanation of the circumstances;
- supporting information only where reasonably necessary.

The school will aim to reach a decision within **10 school days** of receiving sufficient information.

Assistance may be reviewed if circumstances change.

15. Payment arrangements

Where a charge applies, the school will normally provide parents and carers with:

- reasonable notice of the charge;
- the payment deadline;
- available payment methods;
- information about instalment arrangements where available;
- details of the school's remission process.

The school will make reasonable efforts to accommodate families who need to spread payments.

A parent or carer's inability to pay will be handled sensitively and will not result in public identification of the pupil.

16. Refunds and cancellations

The school's refund arrangements will be communicated when a charge is requested.

Where the school receives a refund from a supplier following cancellation, the school will consider whether an equivalent refund should be made to parents and carers.

The school may retain reasonable non-refundable costs that it has already incurred, where these cannot be recovered.

Where a pupil is unable to attend because of illness or another exceptional circumstance, the school will consider whether a refund is possible on a case-by-case basis.

17. Unpaid charges

The school will seek to recover legitimate charges fairly and proportionately.

Before taking recovery action, the school will consider whether:

- the family has requested financial assistance;

- the charge has been correctly applied;
- a payment plan would resolve the issue;
- the family is experiencing financial hardship.

Pupils will not be publicly identified, excluded from compulsory education or otherwise disadvantaged because their parents or carers have an unpaid charge.

18. Equality and accessibility

The school will apply this policy consistently and in accordance with its Equality Policy.

The school will consider reasonable adjustments and accessibility requirements where a pupil's disability or SEND affects their ability to participate in a chargeable activity.

No pupil should be prevented from accessing a meaningful educational experience solely because of disability or financial disadvantage where the school can reasonably provide assistance.

19. Free school transport and related support

Eligibility for free home-to-school transport is principally determined by the local authority rather than the school.

Families should be directed to the relevant local authority where they may qualify.

From 2026–27, some transport eligibility remains linked to **Targeted FSM** criteria, including specific distance and age requirements.

The school may provide additional discretionary support where its own funding permits.

20. Holiday Activities and Food Programme

Families should be advised that eligibility for the Holiday Activities and Food Programme (HAF) is not identical to the expanded FSM entitlement.

From September 2026, HAF eligibility remains aligned to the **Targeted FSM** criteria rather than all pupils who qualify through Expanded FSM.

The school will signpost eligible families to the local HAF programme where appropriate.

21. Funding and charitable assistance

Where appropriate, the school may use:

- school hardship funds;
- Pupil Premium funding, where permitted;
- donations;
- charitable funding;

- grants;
- funds raised by the school or its parent association;
- other lawful sources of assistance.

Funds will be used in accordance with any applicable funding conditions.

22. Financial controls

All charges and remissions will be recorded through the school's financial systems.

The school will maintain appropriate records of:

- charges raised;
- payments received;
- remissions granted;
- hardship assistance;
- refunds;
- outstanding balances.

Access to confidential financial information will be restricted to staff who require it for legitimate school purposes.

23. Complaints and appeals

Parents and carers who believe that this policy has been applied incorrectly should first contact the Headteacher or designated finance officer.

If the matter cannot be resolved, the school's Complaints Policy will apply.

A parent or carer may request a review of a discretionary remission decision where there is new information or evidence that relevant circumstances were not considered.

24. Review

This policy will be reviewed annually and sooner if there are significant changes to legislation, DfE guidance, funding arrangements or the school's financial circumstances.

The next scheduled review is **September 2027**.

25. Parent-facing summary

The school will provide a plain-language summary explaining:

- which activities are free;
- which activities may incur charges;
- which activities rely on voluntary contributions;
- how Free School Meals work;
- the difference between Expanded FSM and Targeted FSM;

- how families can request financial assistance;
- how to arrange payment plans;
- who to contact for confidential support.

The school will make clear that **financial difficulty should never prevent a parent or carer from asking for help.**

Approval

Approved by: _____

Position: _____

Date: _____

Review date: _____