



**ST. BART'S**  
MULTI-ACADEMY TRUST

# TRUST CHARGING AND REMISSIONS POLICY

September 2025



## Contents

St. Bart's Mission .....	4
St. Bart's Vision and Values .....	4
St. Bart's Sustainability .....	4
Trust Charging and Remissions Policy .....	5
1. Aims .....	5
2. Legislation and guidance .....	5
3. Definitions .....	5
4. Roles and responsibilities .....	5
4.1. Finance and Operations Committee .....	5
4.2. Chief Finance Officer (CFO) .....	5
4.3. Principal .....	5
4.4. Staff .....	5
4.5. Parents/carers .....	6
5. Where charges cannot be made .....	6
5.1. Education .....	6
5.2. Transport .....	6
6. Where charges can be made .....	7
6.1. Education .....	7
6.2. Optional extras .....	7
6.3. Music tuition .....	8
6.4. Residential visits .....	8
7. Voluntary contributions .....	8
8. Activities we charge for .....	9
9. Remissions .....	9
10. Monitoring arrangements .....	9

## St. Bart's Mission

Our mission is to **ADVANCE EDUCATION** and to provide the best curriculum in all our academies, enabling every child to realise their full potential.

## St. Bart's Vision and Values



We have a **Passion** for releasing potential in all our children and staff through the **Encouragement** and development of **Ambition**, aspiration and excellence in all aspects of our work. Our commitment is to place children at the centre of everything we do. Working in **Collaboration**, we strive to provide the highest quality of educational experiences and outcomes for young people in an inclusive environment. Through the **Enjoyment** of learning, we live life together in all its fullness through **PEACE**.

We believe this vision empowers children with the skills to make a positive impact on the future of the communities they serve.

Our Trust Christian ethos is also captured by the **PEACE** values and all schools work in close partnership (whether C of E or community) to ensure that all children, adults and the communities they serve flourish just as Jesus encouraged us to do in John 10:10 -

***"I have come that they may have life, and have it to the full."***

## St. Bart's Sustainability

We are committed to educating our pupils about environmental concerns and the importance of living sustainably. We recognise our responsibility to ensure that pupils are prepared for a world impacted by climate change through learning and practical experience.

We encourage both pupils and staff to think about the environment and how their actions will impact upon their local surroundings, as well as the global environment.

We will ensure pupils are taught about environmental sustainability, promote an eco-friendly attitude, and ensure that the Trust itself is as sustainable as it can be.

# Trust Charging and Remissions Policy

## 1. Aims

St Bart's Multi Academy 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.

This policy complies with our funding agreement and articles of association.

## 3. Definitions

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

## 4. Roles and responsibilities

### 4.1. Finance and Operations Committee

The Finance and Operations Committee has overall responsibility for approving the charging and remissions policy and monitoring the implementation of this policy in line with the Scheme of Delegation.

### 4.2. Chief Finance Officer (CFO)

The CFO is responsible for ensuring staff are familiar with the charging and remissions policy.

### 4.3. Principal

The principal is responsible for this policy being applied consistently at academy level.

### 4.4. Staff

Staff are responsible for:

- Implementing the charging and remissions policy consistently
- Notifying the principal of any specific circumstances that they are unsure about or where they are not certain if the policy applies.

The trust or academy will provide staff with appropriate training in relation to this policy and its implementation.

#### **4.5. Parents/carers**

Parents/carers are expected to notify staff or the principal of any concerns or queries regarding the charging and remissions policy.

### **5. Where charges cannot be made**

Below we set out what we cannot charge for:

#### **5.1. 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, if the tuition is required as part of the National Curriculum, a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education. This is 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 academy, except where the request for the re-sit is made solely by the parent and not the school.

#### **5.2. Transport**

- Transporting registered pupils to or from the school premises, where the local authority (LA) has a statutory obligation to provide transport
- Transporting registered pupils to other premises where the Local Governing Committee or local authority 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 which is part of the National Curriculum.

## **6. Where charges can be made**

Below we set out what we can charge for:

### **6.1. Education**

- Any materials, books, instruments or equipment, where the child's parent/carer wishes the child to own them
- Optional extras (see section 6.2)
- Music and vocal tuition, in limited circumstances (see section 6.3)
- 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.

### **6.2. 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
- 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)
- Acts of vandalism and negligence: our schools reserve the right to recover part, or the whole cost, of damage to buildings or equipment which is the result of vandalism or negligence by a pupil or parent.

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.

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.

### **6.3. 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.

### **6.4. Residential visits**

We can charge for board and lodging on residential visits and/or outdoor pursuit courses, but the charge must not exceed the actual cost including all overheads.

## **7. Voluntary contributions**

As an exception to the requirements set out in section 5 of this policy, the school is able to ask for voluntary contributions from parents/carers to fund activities that would not otherwise be possible.

Nothing in this policy statement precludes our schools from inviting parents to make voluntary contributions.

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.

If the school is unable to raise enough funds for an activity or visit, then it will be cancelled.

## **8. Activities we charge for**

The school will charge for the following activities:

- Before and after school clubs
- Early Years fees
- Holiday clubs
- 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
- Community facilities hire.

## **9. Remissions**

In some circumstances, the school may not charge for items or activities set out in sections 6 and 8 of this policy.

Our schools may remit charges in full or in part to parents after considering specific hardship cases. The school/Trust invites parents to apply, in the strictest confidence, for the remission of charges in part or in full. The Headteacher at each school holds discretion to authorise remission.

## **10. Monitoring arrangements**

The CFO monitors charges and remissions and ensures these comply with this policy.

This policy will be reviewed annually. At every review, the policy will be approved by the Finance and Operations Committee.



# ST. BART'S

MULTI-ACADEMY TRUST

**St. Bart's Multi-Academy Trust**

c/o Belgrave St. Bartholomew's Academy,  
Sussex Place, Longton, Stoke-on-Trent, Staffordshire, ST3 4TP  
[www.sbmat.org](http://www.sbmat.org) T: 01782 486350

