



ST FAITH & ST MARTIN
CHURCH OF ENGLAND JUNIOR SCHOOL

**CHARGING AND REMISSIONS
POLICY**

Policy owner	Full Governing Body
Approval date	October 2026
Effective from	Date of approval
Review date	October 2027, or earlier if legislation or guidance changes
Publication	School website; paper copy available from the school office

Governor approval

The Governing Body should confirm the approval date, minute reference and review date at the meeting.

October 2026 update summary

Area	Update for governor review
Legal clarity	Separates free education, optional-extra charges, residential board and lodging, and voluntary contributions.
Remissions	Removes obsolete benefit and income wording; uses current DfE/LA eligibility verification and adds confidential discretionary support.
Financial controls	Aligns collection, coding, reconciliation, refunds and audit trail with the Lincolnshire County Council Schools Finance Handbook.
School Fund closure	Requires all school income to use an approved route into the County Fund/main school budget; the closed School Fund must not be used.
Governance	Adds responsibilities, approval controls, complaints, publication and annual review arrangements.

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1. Purpose and principles

St Faith & St Martin Church of England Junior School is committed to ensuring that pupils can benefit from a broad, balanced and enriching education regardless of family income.

- Education that the law requires to be free will be provided without charge.
- A charge will be made only where the law permits it and this policy authorises it.
- Requests for voluntary contributions will be genuinely voluntary and will never determine an individual pupil's participation.
- Any permitted charge will be reasonable, transparent and no more than the lawful cost attributable to that pupil.
- Remission and hardship arrangements will be explained clearly, applied confidentially and reviewed fairly.
- All income will be collected, recorded, banked, coded and reconciled through approved County Council and school systems.

Key distinction A voluntary contribution is not a charge. A charge for an optional extra requires advance parental agreement and may be a condition of participation; a voluntary contribution must never be treated that way.

2. Scope and legal framework

This policy applies to maintained-school activities, visits, optional extras, music tuition, extended services, materials that parents wish to own, and related income and remissions.

It is informed by:

- Education Act 1996, sections 449–462 (as amended);
- The Education (School Sessions and Charges and Remissions Policies) (Information) (England) Regulations 1999;
- DfE, Charging for school activities: departmental advice for governing bodies, school leaders, school staff and local authorities;
- The Charges for Music Tuition (England) Regulations 2007;
- current DfE guidance on benefits-based free school meals and associated eligibility checks; and
- Lincolnshire County Council Schools Finance Handbook A–P, including Section C: Income Collection (August 2026).

If legislation, statutory guidance or a lawful County Council requirement changes, the school will follow the current requirement and bring this policy back for review.

3. Responsibilities

Role	Responsibility
Governing Body	Approve and keep this policy under review; authorise categories of charge and remission; obtain assurance that charges are lawful, affordable and properly accounted for; monitor material debt, income and equality impacts.
Headteacher	Apply the policy; approve activities and proposed charges/contributions before parents are contacted; ensure correct wording and equal access; decide discretionary remission within delegated authority; escalate novel or high-risk cases.
School Business Manager	Check costings, legal basis, VAT and coding; administer approved payment routes; maintain evidence; reconcile income monthly; process refunds and report exceptions.

Role	Responsibility
Trip/activity/admin lead	Prepare a full costing and timetable; identify whether the activity is during school hours, a required part of education, an optional extra or contribution-funded; use approved parent communications and provide participation/payment records.
All staff	Do not collect or retain money outside approved arrangements; issue or record receipts as required; safeguard cash and personal data; refer affordability requests sensitively.

4. Education and activities for which no charge will be made

The school will not charge parents for:

1. admission to the school or as part of the admissions process;
2. education provided during school hours, including materials, books, instruments and equipment needed for that education;
3. education outside school hours where it is part of the National Curriculum, religious education, or a prescribed public examination syllabus for which the pupil is being prepared at the school;
4. instrumental or vocal tuition where it is an essential part of the National Curriculum, forms part of a prescribed public examination syllabus, is first-access Key Stage 2 tuition, or another statutory exemption applies;
5. entry to a prescribed public examination where the pupil has been prepared for it at the school, and a re-sit where the pupil is being prepared for the re-sit at school;
6. education on a visit where the education is required to be free under the rules above;
7. transport where the local authority has a statutory duty, transport to other premises where the school/authority has arranged education, transport necessary for an examination requirement for which the pupil was prepared at school, or transport provided in connection with an educational visit; and
8. the cost of supply teachers covering teachers who are absent because they are accompanying pupils on a residential visit.

5. Activities for which a charge may be made

Subject to advance approval, the school may charge for the following lawful categories:

Category	Conditions
Optional extras	Education or activities mainly outside school hours that are not National Curriculum, prescribed-examination or religious education requirements. This may include optional clubs, social events such as a school disco, and non-required trips.
Residential visits	Actual board and lodging costs only, subject to statutory remission. Education, required transport and supply-cover costs must not be included where the visit is required to be free.
Music tuition	Individual or group instrumental/vocal tuition requested by the parent, unless an exemption applies. The charge must not exceed the cost of provision. No charge will be made for a looked-after child where the regulations prohibit it.
Materials to own	Ingredients or materials only where the parent has indicated in advance that they wish to own the finished product. Pupils will not be disadvantaged if the parent does not wish to own it.
Examinations	An entry fee where the pupil has not been prepared for the examination at school; or recovery of a fee where, without good reason, a pupil fails to meet an examination requirement.
Extended services	Optional breakfast, after-school, childcare or supervised activities, in accordance with the relevant service terms and any separate pricing decision.
Loss or damage	Reasonable actual repair or replacement cost where school property is lost or damaged through a pupil's wilful or negligent behaviour, after the circumstances and affordability have been considered.

No charge may be introduced retrospectively. Where a proposed activity does not clearly fit a category above, the Headteacher and School Business Manager must obtain advice before communicating a charge.

6. Optional extras: consent and calculation

Participation in a charged optional extra is based on parental choice. Written agreement to the activity and charge must be obtained before the pupil takes part.

The charge for each pupil must not exceed the actual cost of providing the optional extra, divided equally by the pupils participating. The costing may include only lawful elements, such as:

- materials, books, instruments or equipment provided for the optional extra;
- buildings and accommodation;
- non-teaching staff;
- teaching staff engaged under a contract for services solely to provide the optional extra, including a supply teacher engaged specifically for it; and
- the appropriate proportion of employed teaching staff costs for chargeable optional music or vocal tuition.

The charge must not include profit, a subsidy for pupils whose parents are unable or unwilling to pay, or alternative provision for pupils who do not participate. Regular teachers' salaries must not be added merely because staff support an optional event.

Example — school disco If the school organises an optional disco outside school hours, an entry charge may cover the actual attributable cost per participating pupil. If the purpose is to raise unrestricted funds above cost, the additional amount must be sought as a clearly voluntary donation, not hidden in a compulsory charge.

Any discretionary reduction or remission is funded separately from the school budget or another lawful source and is not loaded onto other pupils' charges.

7. Voluntary contributions

The school may ask for voluntary contributions to support activities or the school generally, including activities during school hours. Every request must state clearly that:

- the contribution is voluntary and there is no obligation to pay;
- a pupil will not be excluded, treated differently or given lower priority because their parent does not contribute;
- the suggested amount and what it is intended to fund;
- the activity may be cancelled or changed if contributions and other available funding are insufficient; and
- confidential help and instalments are available through the school office.

Parents must not be pressured. The school will not use colour-coded reminders, pupil-facing collection methods that reveal non-payment, or language such as "fee", "balance due" or "must pay" for a voluntary contribution.

If insufficient contributions are received and the school cannot fund the shortfall lawfully, the activity may be cancelled for all pupils. Any refundable contributions will then be returned in accordance with section 12.

8. Visits and the school-hours test

8.1 Non-residential activities

If 50% or more of the activity time occurs during school hours, it is treated as taking place during school hours. Travel during school hours counts; the statutory midday break does not.

8.2 Residential visits

A residential visit is treated as taking place during school hours where the number of school sessions taken up is equal to or greater than 50% of the half-days spent on the visit. A half-day is a period of 12 hours ending at noon or midnight.

8.3 Charging consequence

The school-hours test does not by itself make every outside-hours activity chargeable. Staff must also confirm that it is not required National Curriculum, prescribed-examination or religious education. On a residential visit, actual board and lodging may still be charged, subject to remission.

9. Remissions and financial support

9.1 Statutory remission: residential board and lodging

Where section 457(4) of the Education Act 1996 applies, the school will remit the charge for board and lodging for a parent who meets the qualifying benefits criteria. DfE charging advice links these criteria to benefits-based free school meal eligibility.

For the 2026/27 academic year, current DfE guidance includes verified households receiving Universal Credit (regardless of earnings) or support under Part VI of the Immigration and Asylum Act 1999; certain households receiving income-related Employment and Support Allowance, the guarantee element of Pension Credit, or meeting the separate no-recourse-to-public-funds criteria may also qualify.

Because eligibility rules can change, staff must check the current DfE and Lincolnshire County Council criteria at the date of the visit. Superseded fixed income thresholds must not be used. The Headteacher will ensure that all parents are told how to claim free board and lodging where eligible.

9.2 Discretionary remission

The Headteacher may approve full or partial remission of a lawful charge, within delegated budget authority, where payment would create hardship or prevent access. Factors may include household circumstances, vulnerability, disadvantage, exceptional costs and the educational benefit to the pupil. A pupil premium indicator alone does not create an automatic entitlement unless the law or funding condition says so.

Requests will be handled confidentially and consistently. The decision, reason, amount, funding source and approval will be recorded without unnecessary sensitive detail. A parent may ask the Headteacher to review a decision; complaints may then be made under section 14.

9.3 Planning and instalments

Where practicable, likely visits and approximate costs will be shared early. Residential visits should normally be announced at least six months ahead. Reasonable instalment arrangements may continue beyond the activity date where approved, but the school will not use credit arrangements that expose families or the school to unmanaged risk.

10. Information to parents

Every request or charge notice must be approved before issue and must set out, in plain language:

- what the activity is, when it occurs and whether participation is optional;
- whether the amount is a charge, a voluntary contribution, or a charge with remission available;
- the amount, how it was calculated, payment deadlines and any cancellation terms;
- that non-contribution will not disadvantage a pupil where the request is voluntary;
- how to request instalments or confidential financial assistance; and
- the approved payment route and contact details for questions.

No pupil will be used to pursue payment. Communications and decisions will comply with data-protection requirements and protect family confidentiality.

11. Collection, accounting and control of income

All money collected under this policy is official school income and must be managed in accordance with the school's Finance Policy and the Lincolnshire County Council Schools Finance Handbook.

1. Use the approved online payment platform wherever practicable. Online income must be paid into the Council bank account and allocated through the approved County Council process to the correct income code.
2. The School Fund account has closed. Charges, contributions, ticket receipts, donations connected with school-led activities and other budget-share income must not be routed through that account, a personal account or an informal cash pot.
3. Record income at the point of receipt. Issue or maintain an official receipt/register, safeguard cash, restrict access and bank cash promptly and intact. Cash must not be used directly to meet expenditure.
4. Segregate receipting, cash counting, banking and reconciliation where practicable. Use two-person cash verification where practicable and retain dated/initialled evidence of supervisory checks.
5. Code income gross to the correct income general-ledger account; do not net it against expenditure. Apply the correct VAT treatment and seek County Council VAT advice if uncertain.
6. Reconcile receipts, platform reports, cash counts, banking/remittance and the general ledger end-to-end. Third-party payment platforms must be reconciled at least monthly.
7. Retain the activity approval, costing, parent notice, consent, payment/receipt record, banking evidence, reconciliation, remission/refund approval and ledger evidence for the applicable retention period.

Audit trail The records must allow an independent reviewer to trace the parent communication and approval through to receipt, banking, ledger coding, any refund or remission, and the final activity account.

12. Cancellations, refunds and debt

Cancellation and refund terms will be made clear before payment. Where the school cancels an activity, recoverable balances will normally be refunded; any proposed retention for an irrecoverable committed cost must be lawful, reasonable and consistent with the terms communicated to parents.

Refunds require evidence of the original payment, calculation of the amount and independent authorisation. They will normally be returned through the original approved payment route and recorded against the relevant activity/income code.

Outstanding charges are followed up discreetly and proportionately. Official invoices are used where required by County Council procedures. Debt write-off must follow delegated limits, evidence recovery action and be reported as required. A voluntary contribution is not a debt and must never be pursued as one.

13. Equality, inclusion and reasonable adjustment

The school will consider the impact of charges and payment arrangements on protected groups, disabled pupils, pupils with special educational needs and disabilities, looked-after children and families facing hardship.

Reasonable adjustments will be made so that disabled pupils are not placed at a substantial disadvantage. Costs arising from a reasonable adjustment must not be transferred to the pupil merely because of disability. Decisions will support the school's equality duties and inclusive Christian ethos.

14. Questions and complaints

Questions about the basis or calculation of a charge should first be raised with the School Business Manager. Requests for remission or review should be made confidentially to the Headteacher.

If the matter remains unresolved, the parent may use the school's published complaints procedure. A complaint will not affect the pupil's treatment or access to free education.

15. Publication, monitoring and review

- The policy will be published on the school website and made available in paper form on request.
- The Governing Body will review it at least annually and sooner following legal, DfE or County Council changes.

- The Headteacher and School Business Manager will monitor remissions, cancellations, complaints, debt, unreconciled income and control exceptions and report significant matters to governors.
- The policy should be read with the Finance Policy, Educational Visits Policy, Complaints Procedure, Equality Information and Objectives, Data Protection Policy and relevant extended-services terms.

Primary references

DfE — [Charging for school activities](#) (non-statutory departmental advice).

Legislation — [Education Act 1996, Part VI, Chapter III](#).

DfE — [Free school meals guidance for schools and local authorities](#) (current eligibility information).

Appendix 1 — Quick decision table

Situation	Permitted approach	Key control
Curriculum visit in school time	No charge for education/required transport. A voluntary contribution may be requested.	No exclusion or different treatment for non-payment.
Optional club or disco mainly outside school time	Charge as an optional extra, with advance parental agreement.	Actual lawful cost per participant only; no hidden fundraising surplus.
Residential visit	Charge actual board and lodging; other charging depends on curriculum and timing rules.	Tell all parents about statutory remission and verify current criteria.
Ingredients/materials	Charge only if parent wants to own the finished product.	Obtain advance indication; do not disadvantage pupils who decline ownership.
Parent-requested music tuition	Charge up to actual provision cost, unless an exemption applies.	Check curriculum, first-access and looked-after-child exemptions.
Fundraising for school benefit	Seek a clearly voluntary donation or run a separately authorised fundraising arrangement.	Do not describe a donation as compulsory; route income to approved Council/main-budget arrangements.