WICKERSLEY PARTNERSHIP TRUST.

Charging and Remissions Policy

DATE: October 2026
OWNED BY: Director of Finance
APPROVED BY: Interim Finance Subcommittee

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This policy sets out the framework and statutory rules for charging, remissions, voluntary contributions, and financial management of activities across all academies within Wickersley Partnership Trust (WPT), in compliance with Department for Education (DfE) advice, the Children's Wellbeing and Schools Act 2026, and WPT funding agreements.

1. Introduction

1.1 Wickersley Partnership Trust (hereafter known as WPT) recognises the valuable contribution that the wide range of additional activities, including clubs, out of school trips, residentials and experiences of other environments, can make to students' all-round educational experience and their personal and social development.

1.2 WPT aims to promote and provide activities both as part of a broad and balanced curriculum for the students of the schools and as additional optional activities.

1.3 While wishing to promote and provide as broad a range of such activities as possible for the benefit of all students, WPT reserves the right to make a charge for certain activities organised by the school/Trust from time to time.

(Throughout this policy, the term "parents" means all those having parental responsibility for a student.)

2. Aims

The aim of this policy is to set out what charges will be levied for activities, what remissions will be implemented, and the circumstances under which voluntary contributions will be requested from parents, ensuring transparency, financial control, and statutory compliance across all Trust schools.

3. Legislation and Regulation

The legislative and regulatory basis for charging and remissions is contained within:

- Sections 449 - 462 of the Education Act 1996
- The Charges for Music Tuition (England) Regulations 2007
- Section 27(1) of the Education Act 1996 (Power to provide community facilities)
- DfE Departmental Advice: Charging for school activities (May 2018)
- WPT Master and Supplemental Academy Funding Agreements
- Children's Wellbeing and Schools Act 2026 (including statutory duties on free breakfast clubs, universal benefit-related FSM eligibility, and branded uniform limits)
- Equality Act 2010 (Reasonable adjustments for pupils with SEND or protected characteristics)
- UK General Data Protection Regulation (UK GDPR) and Data Protection Act 2018
- The Education (Prescribed Public Examinations) Regulations 1989

4. Principles

4.1 No charge can be made for education provided during school hours, nor for fulfilling the statutory school curriculum or religious education, subject to the statutory rules and exceptions set out in this policy.

4.2 To determine whether an activity falls within or outside school hours, the following DfE statutory tests apply:

Day Visits and Activities:
If 50% or more of the time spent on the activity (including travel time that takes place during school hours) falls within official school hours, the activity is deemed to take place during school hours. No charge may be made for education or transport.

Residential Visits:
The visit is deemed to take place during school hours if the number of school sessions missed by participating pupils equals or exceeds 50% of the total number of half-days spent away on the visit. A 'half-day' is defined as any 12-hour period ending at noon or midnight. Where a residential visit is deemed to take place during school hours, education and transport are free, and charges are restricted solely to actual board and lodging costs.

5. Charging Framework

The Trust reserves the right to make a charge in the following circumstances for activities organised by the School/Trust where permitted by law and detailed within this policy.

6. Materials, Equipment and Ingredients

6.1 WPT reserves the right to ask for a contribution towards the cost of materials, equipment and ingredients relating to activities taking place in school hours, for example during design and food technology lessons for students. This will be at the discretion of the school.

6.2 Charges for materials, equipment, or ingredients used in activities taking place during school hours (for example, in Design Technology, Food Technology, or Art) may only be made where parents have confirmed in advance that they wish to own the finished product or item. Where parents do not wish to own the finished item, no compulsory charge can be levied, although voluntary contributions may be requested in accordance with Section 14.

6.3 It is the responsibility of parents to cover the cost of purchase or hire of instruments, materials, equipment or clothing for activities which take place outside school hours and which are purely voluntary and optional. (It remains the parent's responsibility to supply school uniform, including PE Kit, subject to Trust compliance with DfE statutory guidance on uniform affordability and branded item limits).

7. Music Tuition

7.1 The school can charge for individual and/or group tuition in the playing of a musical instrument, including vocal tuition, whether in or out of school hours, unless it is provided as part of the GCSE examination specification for a prescribed public examination or is required by the National Curriculum.

7.2 Any such tuition must be delivered at the request of the parents. The costs of music tuition will not exceed the cost of providing it, including, amongst other things, the cost of providing a music teacher/tutor, manuscripts and instruments. Charges must not include any subsidy for other pupils.

7.3 In all cases where a permitted charge is likely to be made the parents must be told the amount in advance.

7.4 Statutory Exceptions: No charge will be made for music tuition provided to Looked After Children (LAC / children in care), or for whole-class instrumental and vocal tuition provided under the Key Stage 2 First Access programme / National Curriculum.

8. Charging for Residential and Day Trips / Activities

8.1 If the activity is a residential trip during school hours (or deemed to be during school hours under Section 4), charges will be made for the board and lodging element of such activities only, if applicable.

8.2 Parents will be notified in advance of any such activities and their estimated cost and parents' consent will be obtained for a student's participation in any such activity for which a charge is made. Board and lodging charges will be calculated by dividing the actual cost of board and lodging equally among all participating pupils. Charges must not include any element of cross-subsidisation for pupils entitled to remissions, nor cover supply teacher costs for accompanying staff.

8.3 All such charges will be made in line with government guidelines and will take into account the circumstances of parents. Parents will be explicitly informed in writing of their entitlement to free board and lodging if they meet the benefits-related remission criteria set out in Section 15.

8.4 The school reserves the right to cancel trips if they become economically unviable due to insufficient voluntary contributions or funding shortfalls. Adequate notice will be given to notify parents of such decisions.

8.5 If the parent cancels the trip/visit without reasonable cause, the Trust reserves the right to charge the parent for non-refundable costs incurred by the school.

9. Transport

No charge will be made for transport provided in connection with:

- Transporting pupils to or from the school premises where the Trust or Local Authority has a statutory obligation to provide transport.
- Transporting pupils between school premises or to other educational premises where the Trust has arranged for education to take place during school hours.
- Transport for pupils taking prescribed public examinations for which they have been prepared by the school.
- Transport provided for educational visits taking place during school hours.

10. Examination Fees

10.1 No charge will be made for the first attempt at a prescribed public examination for which the student has been prepared by the school. If a student fails without reasonable cause to complete the examination requirements, any second attempt of a public examination for which the school has paid the entry fee, the fee involved will be recovered from the student's parents.

10.2 Where a student and their parents wish to enter a public examination for a subject/course not delivered or prepared for by the school, a charge for the cost of entering the student for the examination may be made if previously agreed by the parent.

10.3 The school will review which students did not reach their potential grade and decide which students should be re-entered for exams. Where the school has recommended a resit, this will be paid for by the school.

10.4 Parents can request to pay for a re-sit if the school has not already recommended for this to take place. In this circumstance, and where the school has not prepared the student for the examination, the school will have the right to charge for the exam entry fee.

10.5 Additional Exam Entries: Where an examination is not on the prescribed public examination set list, but the school arranges for the examination to be taken at parental request, the actual cost of entry will be charged to the parent.

11. Optional Extras and Extended Services

11.1 Optional extras can include:

- Education provided outside of school time not part of the curriculum, part of religious education or in preparation for a public examination a student is being prepared for by the school;
- Transport that is not taking a student to or from the school for statutory education;
- Extended day services such as paid wraparound care and after-school clubs.

11.2 The school endeavours to provide a range of activities which are held outside the compulsory curriculum. Parents will be notified in advance of any such activities and their estimated cost. Parent consent will be obtained for a student's participation in any such activity for which a charge is made. Any charge will depend upon the type of activity, its cost and the number of participants. This charge will not exceed the total cost of providing the activity and must not include a subsidy for other participating pupils.

11.3 Where such an activity is provided to fulfil any requirements specified by a GCSE examination specification for a prescribed public examination or is required by the National Curriculum or for Religious Education, then it is not regarded as an 'optional extra' and no charge can be made.

11.4 Free Breakfast Clubs (Primary Schools): In accordance with duties under the Children's Wellbeing and Schools Act 2026, primary schools participating in the national free breakfast club programme will provide a 30-minute breakfast club free of charge to all attending pupils. No charge will be made for this funded 30-minute session. Paid wraparound childcare (e.g. extended morning care prior to the 30-minute free session, or after-school care) is entirely optional and separate; participation in paid wraparound care cannot be made a prerequisite or condition for accessing the free breakfast club.

12. Admissions

No charge or voluntary contribution will be requested, required, or sought as part of the admissions process for any school within WPT, nor as a condition of entry or continued attendance.

13. Community Users and Lettings

The Trust/School may arrange to let its premises and facilities to members of the local community, other organisations with the Local Authority, businesses, charities and sports clubs. All fees and charges for community use and lettings will be set in accordance with Chapter 6 of Managing Public Money and the Academy Trust Handbook, ensuring full cost recovery or commercial market rates as appropriate (see WPT Lettings Policy).

14. Voluntary Contributions

14.1 Nothing in this policy statement precludes schools from inviting parents to make voluntary contributions towards the cost of providing education, activities, or visits for students.

14.2 Safeguards on Voluntary Contributions:

- Voluntary contributions must be genuinely voluntary. No parental contribution is mandatory.
- Pupils will not be treated differently, discriminated against, or excluded from an activity regardless of whether their parents make a voluntary contribution.

- Schools must state clearly in all communications how places are allocated (e.g. first-come-first-served) upfront, ensuring that place allocation is never dependent on making a financial contribution.
- No pressure will be exerted on parents. The use of colour-coded payment reminder letters, direct debit mandates, or persistent collection requests is strictly prohibited.
- If an activity cannot be funded without voluntary contributions, this will be made clear to parents at the outset. If insufficient voluntary contributions are received and the activity is economically unviable, the trip or activity may be cancelled. Adequate notice will be provided to parents.

15. Remissions and Financial Support

15.1 Parents may apply to WPT for remission of charges in whole or part towards the charges for activities or for financial support towards the purchase of uniform items. This is available on a case-by-case basis.

15.2 WPT may from time to time decide to remit all or part of the cost of activities involving students. This will be at the discretion of the Headteacher of the school. In other circumstances, there may be cases of family hardship which make it difficult for students to take part in particular activities for which a charge is made.

15.3 When arranging a chargeable activity, WPT will invite parents to apply in strictest confidence for the remission of charges in part or in full. To qualify for help, parents must complete the Application for Remission form (see Appendix A) and forward it to the Trust Finance Team (email: finance@wickersleypt.org) and, if requested, provide proof of their income or benefit.

15.4 **Authorisation and Appeals:** Authorisation of remission will be made by the Headteacher of the school. Where an application is refused, parents have the right of appeal to an independent appeal officer or panel not involved in the original decision (such as the Director of Finance or a designated Trustee).

15.5 Statutory Remission Criteria: In accordance with statutory requirements, parents/carers in receipt of benefits-related Free School Meals (FSM) entitlement are automatically entitled to 100% remission of board and lodging charges for residential visits taking place during (or deemed to take place during) school hours. Eligible benefits include:

- Universal Credit (in accordance with statutory FSM entitlement criteria, covering all UC households under 2026 regulations);
- Income Support;
- Income-based Jobseeker's Allowance (JSA);
- Income-related Employment and Support Allowance (ESA);
- Support under Part VI of the Immigration and Asylum Act 1999;
- The guarantee element of State Pension Credit.

(Note: References to Child Tax Credit and Working Tax Credit have been removed following the complete migration of legacy benefits in April 2025).

15.6 School Uniform Support: Remission or financial support for school uniform items is at the discretion of the Headteacher. Uniform support policies across all WPT schools adhere to statutory uniform guidance under the Children's Wellbeing and Schools Act 2026, which limits branded uniform items to a maximum of 3 items in primary schools and 4 items in secondary schools (where 1 item is a tie).

16. Financial Controls and Governance

16.1 **Trip Income Management:** All income received for trips, educational visits, music tuition, and lettings must be formally receipted, banked, and reconciled against participant rosters and expected totals in accordance with WPT finance procedures.

16.2 **Debt Recovery:** The Trust will actively pursue the recovery of outstanding debts incurred for chargeable optional extras (e.g., wraparound childcare, damage caused by vandalism, or non-prepared exam fees). Reminders will be issued promptly and professionally.

16.3 **Debt Write-Offs:** Where a debt is deemed unrecoverable, write-offs must be approved in accordance with the WPT Scheme of Delegation and limits established in the Academy Trust Handbook. An annual summary of all remissions granted and debt write-offs will be submitted to the Finance Subcommittee for monitoring.

17. Equality and Data Protection

17.1 **Equality Act 2010 Compliance:** No additional charges will ever be made to pupils with Special Educational Needs and Disabilities (SEND) or protected characteristics for adjustments, equipment, or support required to enable their full participation in school activities, trips, or educational provision.

17.2 **Data Protection (UK GDPR):** All remission applications, income assessments, and financial hardship evidence will be treated with strict confidentiality. Data will be processed securely in accordance with UK GDPR and retained only for the required retention period specified in the Trust's Document Retention Schedule.

18. Training

The Finance Team and school administrative staff will be trained in the process for charging, remissions, voluntary contributions, and financial controls as part of their standard scheme of work.

19. Responsibilities

The following responsibilities apply in relation to this policy:

- Board of Trustees – has overall responsibility for the approval and oversight of this policy.
- Finance Subcommittee – has the responsibility of monitoring the implementation of the policy and receiving an annual summary report on remissions and debt write-offs.
- Director of Finance / Interim Director of Finance – has the responsibility to implement and ensure the policy is legally compliant, maintained, and tailored to WPT's circumstances.
- Headteachers / Local Governing Bodies – have responsibility to adhere to and apply the policy in their school, and publish the school-level charging schedule.
- Teachers/school administrators – have responsibility to understand the policy and explain its application to parents as appropriate.

20. Insurance

Any insurance costs will ordinarily be covered under the school policy or Risk Protection Arrangement (RPA). Where any additional premiums are due for any specific activity, the cost will be included in charges made for trips and activities.

21. Monitoring and Review

The Trust will review this policy annually, or sooner if legislative changes or updated DfE guidance occur. The policy will be published on the WPT Trust website and on each individual school website. Each school will maintain and publish a School-Level Charging Schedule (Appendix B) under this policy.

22. Links with Other Policies

This policy links with our policies on:

- Lettings Policy
- School Uniform Policy (including branded item limits)
- Data Protection Policy & Document Retention Schedule
- WPT Scheme of Delegation & Finance Regulations

23. Version Control

Current Version: 5

Date	Revision (Details and Reason)	Author
Oct 2019	*Initial Trust-wide Charging & Remissions Policy established.*	*Chief Finance Officer*
Oct 2021	*Biennial review and alignment with updated DfE guidance.*	*Chief Finance Officer*
Oct 2023	*Routine review and updating of music tuition fee structures.*	*Chief Finance Officer*
Oct 2024	*Standard template formatting update.*	*Chief Finance Officer*
Oct 2026	• *Format update prior to full legislative and DfE review.* • *Comprehensive update: linked remission to FSM/UC eligibility; separated free 30-min breakfast club from paid wraparound care under 2026 Act; added DfE school-hours tests, transport, admissions, equality/data protection rules, and trip finance controls.*	*Interim Director of Finance*

Appendix A – Application for Remission from Charges or School Uniform Support

Application Form for Financial Support / Remission of Charges			
Student Name:			
Year Group/Class:			
School:			
Parent/Carer Name:			
Contact Number:			
Contact Email:			
Signature:		**Date:**	
Activity / Funding Required For:			
Total Cost (£):			
Reason for Application / Circumstances: (Please attach supporting evidence if required)			
Qualifying Benefit / FSM Status (tick all that apply):			
Free School Meals (FSM) Eligible		**Universal Credit**	
Income Support		**JSA**	
ESA		**Pension Credit**	
To be completed by Academy (Approval):			
Granted / Not Granted (Delete as appropriate)	**Amount Granted (£):**		
Appeal Route (if applicable):			
Right of Appeal to Independent Appeal Officer (Director of Finance / Trustee Delegate)			

Appendix B – Template School-Level Charging Schedule

Each school within Wickersley Partnership Trust publishes an annual School-Level Charging Schedule under this Trust-wide policy.

Activity / Provision	Category	Charge / Fee Structure	Remission / Support Available
Free Breakfast Club (Primary)	Statutory Free Provision	Free (30-minute funded session)	N/A - Free to all pupils
Paid Wraparound Care	Optional Extra	At cost (e.g. £4.00 per hour)	Case-by-case hardship support
Instrumental Music Tuition	Optional Extra	At cost (e.g. £15.00 per session)	100% remission for LAC / Key Stage 2 First Access
Residential Trip Board & Lodging	Residential Visit	Actual board & lodging cost only	100% remission for benefits-related FSM eligible pupils
Lettings / Facility Hire	Community Facilities	In line with Managing Public Money	N/A

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