

St Monica's Catholic Primary School



Charging and Remissions Policy 2026-2027

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Created by:	Headteacher	
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Statement of intent

St Monica's Catholic Primary School is committed to its mission of 'Success for all within a Christ centred community'. We will treat every pupil and family with dignity, fairness and compassion, and will not allow financial circumstances to become a barrier to participation in education or school life.

The school will comply with the law on charging for school activities and will be open and consistent about when a payment is a lawful charge and when it is a voluntary contribution. No pupil will be treated differently because their parent or carer cannot, or chooses not to, make a voluntary contribution.

Parents and carers will be told, in advance, the basis of any charge, the payment and cancellation terms, and how to request confidential financial assistance. The school will avoid language or practices that could place pressure on families to contribute.

Core commitment

Education provided during school hours is free. Charges will only be made where the law permits them and where this policy authorises them.

1. Scope and core principles

This policy applies to school activities, visits, residential experiences, music tuition, optional extras, extended services, early years provision, materials and finished products, damaged or lost property, school meals, and charges for copies of information.

The school will apply the following principles:

- No charge will be made unless it is permitted by law and covered by this policy.
- Any charge will be transparent, reasonable and no more than the relevant cost of provision.
- Voluntary contributions will be clearly identified as voluntary and will not be pursued as a debt.
- Pupils will not be excluded, embarrassed or disadvantaged because of a family's financial circumstances.
- Requests for remission or assistance will be handled sensitively and confidentially.
- The policy will be published on the school website and made available in an accessible format on request.

2. Legal framework

This policy has been prepared with regard to the following legislation and guidance, as amended from time to time:

- Education Act 1996, particularly sections 449 to 462.
- Education Act 2002, including section 27 on community facilities and services.
- School Admissions Code 2021.
- The Charges for Music Tuition (England) Regulations 2007.
- The Education (Charges for Early Years Provision) Regulations 2012.
- Freedom of Information Act 2000 and the Environmental Information Regulations 2004.
- Department for Education: Charging for school activities.
- Department for Education: Maintained schools governance guide.
- Department for Education: Free school meals guidance for the 2026 to 2027 academic year.

This policy should be read alongside the school's Educational Visits Policy, Complaints Policy, Freedom of Information Policy and Publication Scheme, Lettings Policy, and any published terms for wraparound or nursery provision.

3. Roles and responsibilities

3.1 Governing Body

- Determine and keep under review the school's charging and remissions policy.
- Ensure that charges are lawful, fair and consistent with the school's Catholic ethos.
- Monitor the impact of charges on access and participation, particularly for disadvantaged pupils.
- Ensure the policy is published and reviewed at least annually.

3.2 Headteacher

- Implement this policy and ensure staff communicate charges and voluntary contributions accurately.
- Approve discretionary remissions, payment plans, refunds and exceptional decisions consistently.
- Ensure no pupil is penalised because a parent or carer has not made a voluntary contribution.
- Report significant issues or patterns to the Governing Body.

3.3 School Office and staff arranging activities

- Calculate and record costs accurately.
- Provide written information about the status of payments, deadlines, cancellation terms and available support.
- Maintain appropriate financial records and protect confidential information.
- Refer hardship requests to the Headteacher or designated member of staff.

4. Education and activities provided free of charge

The school will not charge for:

- Admission to the school or any part of the admissions process.
- Education provided during school hours, including materials, books, instruments and other equipment required for that education.
- Education provided 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 by the school.
- Entry for a prescribed public examination where the pupil has been prepared for it by the school, or a resit where the school is preparing the pupil for the resit.
- Instrumental or vocal tuition where it is an essential part of the National Curriculum or is provided under the first access Key Stage 2 instrumental and vocal tuition programme.
- Transport that the local authority is legally required to provide, transport to premises where the school or local authority has arranged education, transport required for an examination prepared for by the school, or transport provided in connection with an educational visit.
- Supply teachers covering for teachers who are absent because they are accompanying pupils on a residential visit.
- The funded early years entitlement itself, including any item or activity that must be provided free as a condition of that entitlement.

5. Charges the school may make

Subject to the detailed conditions in this policy, the school may charge for:

- Optional extras provided outside school hours that are not part of the National Curriculum, religious education or a prescribed public examination syllabus.
- Board and lodging on residential visits, limited to the actual cost and subject to statutory remission.
- Individual or group instrumental and vocal tuition requested by a parent or carer, where charging is permitted.

- Materials, ingredients, books, instruments or equipment where a parent or carer has indicated in advance that they wish their child to own the finished product or item.
- Extended day services, including breakfast clubs, after-school provision, holiday provision and supervised activities, where these are optional.
- Additional early years hours, optional services or consumables outside the funded entitlement, in accordance with current early years requirements.
- School meals for pupils who are not entitled to a free meal, at the published rate.
- The replacement of property damaged or lost through a pupil's deliberate or negligent act, subject to section 13.
- Copies, printing or postage for information requests where a charge is permitted by law and the school's publication scheme.
- Community use or lettings of school premises, under the separate Lettings Policy.

Where a charge is proposed, parents and carers will be given sufficient information in advance to understand what they are agreeing to pay and how the charge has been calculated.

6. Optional extras

Participation in an optional extra is a matter of parental choice. The school will obtain agreement to the charge before the pupil takes part.

The charge for an optional extra may include an appropriate proportion of the cost of:

- materials, books, instruments and equipment;
- buildings and accommodation;
- non-teaching staff;
- teaching staff engaged under a contract for services solely to provide the optional extra; and
- teaching staff providing optional instrumental or vocal tuition, where permitted.

The charge for each participating pupil will not exceed the actual cost of providing the activity divided by the number of pupils participating. It will not include an element to subsidise pupils whose parents or carers are unable or unwilling to pay. The cost of alternative provision for pupils not participating, and the cost of supply cover for teachers accompanying residential visits, will not be included.

7. Voluntary contributions

The school may ask for voluntary contributions to support activities or visits that could not otherwise be funded. Every request will state clearly that the contribution is voluntary.

- There is no obligation to contribute.
- No pupil will be excluded from an activity because their parent or carer is unable or unwilling to contribute.
- Pupils whose families do not contribute will receive the same experience and will not be identified or treated differently.
- The school will not repeatedly pursue, shame or pressure families for a voluntary contribution.
- If insufficient contributions are received and the school cannot meet the shortfall from another source, the activity may be amended or cancelled. This possibility will be explained at the outset.
- An unpaid voluntary contribution is not a debt and will not be treated as one.

Required wording

Letters requesting voluntary contributions should use the phrase "suggested voluntary contribution" and explain both that no child will be excluded and that the activity may not proceed if insufficient funding is available.

8. Music tuition

The school may charge for vocal or instrumental tuition provided individually or in groups where the tuition is requested by a parent or carer. The charge will not exceed the cost of providing the tuition, including the cost of the staff providing it.

No charge will be made where:

- the tuition is an essential part of the National Curriculum;
- the tuition is provided under the first access Key Stage 2 instrumental and vocal tuition programme; or
- the pupil is looked after by a local authority.

Any concessions offered by an external music service will be communicated to families where known.

9. Transport

The school will not impose a charge for transport provided in connection with an educational visit or where transport must be provided free under the Education Act 1996. The school may request a voluntary contribution towards such transport, provided section 7 is followed.

A charge may be made for transport forming part of a lawful optional extra outside school hours, where the activity is not part of the National Curriculum, religious education or a prescribed public examination syllabus, and where the parent or carer has agreed to the charge.

10. Education partly during school hours

Where an activity takes place partly during and partly outside school hours, the statutory calculation will be applied:

- If 50% or more of the total activity time takes place during school hours, the activity is treated as taking place during school hours.
- Travel time counts as school hours where the travel itself takes place during school hours.
- The break in the middle of the school day is not counted as school hours.
- If less than 50% takes place during school hours, the activity is treated as outside school hours; however, the school still cannot charge where the activity is part of the National Curriculum, religious education or a prescribed public examination syllabus.

For residential visits, the school will compare the number of school sessions included in the visit with the number of half-days spent on the visit, using the statutory definition of a half-day.

11. Residential visits

The school will not charge for the education provided on a residential visit that takes place during school hours. It will not charge for education outside school hours where that education is part of the National Curriculum, religious education or a prescribed public examination syllabus. It will not charge for supply cover for accompanying teachers.

The school may charge for board and lodging, but the charge will not exceed the actual cost. Parents and carers will be informed of the right to claim remission and of any additional discretionary assistance available.

Where travel or other elements cannot lawfully be charged, any request for payment will be clearly described as a voluntary contribution.

12. Extended services and early years provision

Charges may be made for optional extended services such as breakfast club, after-school club, holiday provision or other supervised activities. Charges and payment terms will be published separately and reviewed regularly.

For early years provision, the school will not charge for the funded entitlement itself or make access to funded hours conditional on the purchase of meals, consumables, additional hours or activities. The school may charge for optional extras and additional hours where permitted, provided parents are given clear information and a reasonable alternative where required by current guidance.

13. Materials, finished products, damaged or lost property

13.1 Materials and finished products

The school may charge for ingredients or materials only where the parent or carer has indicated in advance that they wish their child to own the finished product. Where ownership is not requested, the materials necessary for education during school hours will be provided free of charge.

13.2 Damaged or lost property

The school may seek the reasonable replacement or repair cost of school property that is damaged or lost as a direct result of deliberate misconduct or negligence by a pupil. Decisions will take account of age, SEND, individual circumstances, the evidence available and financial hardship.

- Any amount requested will be limited to the actual reasonable cost of repair or equivalent replacement, allowing for age and condition where appropriate.
- Normal wear and tear will not be charged for.
- Parents and carers will be informed of the reason and calculation.
- A pupil will not be excluded from education or publicly penalised because a parent or carer has not paid.

14. Remissions and financial support

14.1 Statutory remission for residential board and lodging

The school will fully remit the charge for board and lodging on a residential visit where the visit meets the statutory conditions and the pupil's parent or carer meets the current prescribed eligibility criteria. The school will use the current Department for Education and local authority eligibility checking arrangements. As at July 2026, the linked support applies to targeted free school meals eligibility rather than expanded free school meals alone.

The current targeted eligibility categories include households meeting one or more of the following criteria:

- Universal Credit with annual household earnings of £7,400 or less, after tax and excluding benefits;
- support under Part VI of the Immigration and Asylum Act 1999;
- income-related Employment and Support Allowance;
- the guarantee element of Pension Credit;
- the applicable no recourse to public funds criteria; or
- any other category prescribed by current legislation or Department for Education guidance.

Expanded free school meals provide a free meal to pupils in Universal Credit households above the targeted earnings threshold, but do not automatically confer the additional support linked to targeted free school meals. The school will apply the current eligibility checking arrangements and will not rely solely on an old benefit list.

14.2 Discretionary assistance

The school may remit all or part of a lawful charge, or provide assistance with a voluntary contribution, where financial circumstances would otherwise prevent a pupil from participating. The school may consider:

- targeted free school meals or pupil premium eligibility;
- looked-after or previously looked-after status;
- a sudden change in household circumstances, bereavement, illness or crisis;
- multiple children from the same household taking part;
- other exceptional welfare or safeguarding circumstances; and
- the funding available for the activity.

Discretionary support is not guaranteed and may be full or partial. It will be allocated fairly, consistently and without identifying the pupil to others.

14.3 How to request support

Parents and carers should contact Mrs Collette Price in the School Office. Requests will be handled confidentially. The school may ask for proportionate evidence needed to confirm eligibility or understand hardship, but will avoid unnecessary intrusion. The Headteacher, or a delegated senior leader, will make the decision and keep an appropriate record.

15. Payments, cancellations and refunds

Before accepting payment for a chargeable activity, the school will provide written information about the total or estimated cost, instalment dates, whether any deposit is non-refundable, the circumstances in which refunds may be limited, and any relevant insurance arrangements.

15.1 Deposits

A deposit will only be described as non-refundable where this is stated clearly before payment and where the school may incur a corresponding non-recoverable commitment. The school will not retain more than the loss or cost it has reasonably incurred.

15.2 Cancellation by the school

Where the school cancels an activity, payments will normally be refunded in full. Where cancellation is caused by a third party or circumstances outside the school's control, the school will seek refunds, insurance payments or credits and will return to families the sums recovered, less any clearly evidenced non-recoverable costs that had been explained in the terms.

15.3 Withdrawal by a pupil or family

Where a pupil withdraws, including because of illness, the school will refund any amount not already committed or lost. The school will consider whether the place can be filled, whether the provider will refund the cost and whether insurance applies. No pupil will be refused access to future visits solely because a previous booking was cancelled.

15.4 Postponement and surplus

If an activity is postponed, parents and carers will be told whether payments will be carried forward, transferred with consent or refunded. Once the final cost is known, any material surplus will be refunded or transferred only with the explicit agreement of the parent or carer.

15.5 Unpaid charges

Lawfully agreed charges may be managed under the school's debt procedures, with due consideration of hardship. Voluntary contributions will never be treated as a debt. Pupils will not be publicly identified or denied their statutory education because of an unpaid parental debt.

16. Freedom of information and copies of documents

Information published on the school website will normally be available free of charge. Where the law permits, the school may charge the actual cost of photocopying, printing, postage or another medium. Any charge will be explained in advance and will be consistent with the school's Freedom of Information Policy and Publication Scheme.

Requests for personal data are dealt with under data protection law and are normally free of charge, except where the law permits a reasonable fee for a manifestly unfounded or excessive request or for additional copies.

17. Complaints

Questions about a charge, remission decision or refund should first be raised with the School Office or Headteacher so that the calculation and circumstances can be reviewed. A parent or carer who remains dissatisfied may use the school's Complaints Policy. This does not affect any statutory right to challenge an unlawful charge.

18. Monitoring and review

The Governing Body will review this policy at least annually and sooner where legislation, Department for Education guidance or the school's provision changes. The next scheduled review is July 2027.

Monitoring will include consideration of participation rates, requests for assistance, complaints, unpaid lawful charges and whether any charging practice is creating an unintended barrier for pupils or families.

Appendix 1: Quick reference charging table

Activity or item	Charge permitted?	Key condition
Education during school hours	No	Includes required materials, books and equipment.
Educational visit during school hours	No charge	A clearly voluntary contribution may be requested.
Transport connected with an educational visit	No charge	A clearly voluntary contribution may be requested.
Optional extra outside school hours	Yes	Must not be part of the National Curriculum, RE or relevant examination syllabus; parental agreement required.
Residential board and lodging	Yes	Actual cost only; full remission where statutory targeted eligibility is met.
Supply cover for staff on residential visit	No	Must not be included in the cost.
Parent-requested music tuition	Usually yes	Actual cost only; statutory exceptions apply.
Materials for a finished product	Yes	Only where the parent wants the pupil to own it and agrees in advance.
Breakfast or after-school club	Yes	Optional service; published charges and terms apply.
Funded early years entitlement	No	Access must not depend on buying optional extras.
School meal	Yes, unless free entitlement applies	Published meal price.
Deliberately or negligently damaged property	Potentially	Reasonable repair or replacement cost; individual circumstances considered.
Voluntary contribution	Voluntary only	No exclusion, different treatment or debt recovery.

Key official references

- [DfE: Charging for school activities](#)
- [DfE: Free school meals guidance for schools and local authorities](#)
- [DfE: Maintained schools governance guide](#)
- [Education Act 1996, sections 449 to 462](#)