Summit Education Trust

Charging & Remissions Policy

Date of last review: October 2026

Date of next review: October 2027

Version: 5

Monitoring and Evaluation:

To be reviewed with ongoing monitoring under trips and visits.

Summit Education Trust is committed to the safeguarding and welfare of its students and young people

PURPOSE

Summit Education Trust is committed to providing a broad and enriching education for all pupils.

This policy sets out the circumstances in which the Trust and its academies may charge parents and carers for activities, services and materials, together with the circumstances in which charges cannot be made.

The policy is intended to ensure that charging arrangements are clear, reasonable and consistent across the Trust and comply with relevant legislation and Department for Education guidance.

The Trust will ensure that no pupil is disadvantaged from participating in educational activities because of their parent's or carer's inability or unwillingness to pay, where the law requires the activity to be provided without charge.

SCOPE

This policy applies across Summit Education Trust and all of its academies.

Individual academies may have supplementary arrangements for particular services or activities, provided these are consistent with this Trust policy and have been appropriately authorised.

RESPONSIBILITY AND AUTHORITY

The Board of Trustees retains overall responsibility for the Trust's funds and financial affairs.

The Board may delegate authority for particular charging decisions to committees and for this policy Finance, Audit and Risk have delegated authority to approve.

All charges must be consistent with this policy and applicable legislation.

EDUCATION THAT CANNOT BE CHARGED FOR

The Trust will not charge for education provided during school hours.

This includes the provision of materials, books, instruments or equipment required as part of the education.

The Trust will not charge for education provided outside school hours where it forms part of:

- the National Curriculum;
- a syllabus for a prescribed public examination for which the pupil is being prepared at the academy; or
- religious education.

The Trust will not charge for admission applications.

The Trust will not charge for entry to a prescribed public examination where the pupil has been prepared for the examination at the academy.

EDUCATIONAL VISITS AND TRIPS

The Trust will not charge for education provided during school hours as part of an educational visit.

Where an educational visit takes place outside school hours, charges may only be made where the activity is not part of the National Curriculum, a prescribed examination syllabus or religious education.

Where a visit includes both chargeable and non chargeable elements, charges will be calculated in accordance with the applicable charging legislation and DfE guidance.

The Trust may ask parents and carers for voluntary contributions towards the cost of educational visits and activities.

Parents and carers will be informed clearly where a contribution is voluntary.

No pupil will be excluded from an activity simply because their parent or carer has not made a voluntary contribution.

However, where insufficient funds are raised to enable an activity to take place, the Trust or academy may decide that the activity cannot proceed.

VOLUNTARY CONTRIBUTIONS

The Trust may request voluntary contributions from parents and carers to support activities, educational visits, sporting activities and other enrichment opportunities.

There is no obligation for parents or carers to make a contribution.

A pupil will not be treated differently or excluded from an activity solely because their parent or carer has not made a voluntary contribution.

Information provided to parents and carers will clearly distinguish between charges and voluntary contributions.

Where an activity depends upon sufficient voluntary contributions being received, the Trust may cancel or amend the activity if the required funding is not available

OPTIONAL EXTRAS

The Trust may charge for activities known as optional extras where permitted.

Optional extras may include education provided outside school hours which is not part of:

- the National Curriculum;
- a prescribed examination syllabus for which the pupil is being prepared at the academy; or
- religious education.

Optional extras may also include:

- examination entry fees where the pupil has not been prepared for the examination at the academy;
- transport, other than transport which the Trust is legally required to provide;
- board and lodging on residential visits;

- extended-day services such as breakfast clubs, after school clubs, and supervised homework sessions; and
- other activities permitted by applicable charging legislation.

Parental agreement will be obtained before a pupil participates in a chargeable optional extra.

CALCULATION OF OPTIONAL EXTRA CHARGES

When calculating the cost of an optional extra, the Trust may take account of the actual costs reasonably attributable to providing the activity.

This may include:

- materials, books, instruments or equipment;
- buildings and accommodation;
- non-teaching staff;
- teaching staff employed specifically to provide the optional extra;
- supply staff engaged specifically to provide the optional extra; and
- other directly attributable costs permitted by law.

The charge made to an individual pupil will not exceed the actual cost of providing the optional extra, calculated in accordance with the applicable charging requirements.

The Trust will not use charges for one pupil to subsidise the cost of another pupil whose parent or carer is unwilling or unable to pay.

ACTIVITIES PARTLY DURING SCHOOL HOURS

Where an activity takes place partly during school hours and partly outside school hours, the Trust will ensure that any charge is calculated in accordance with the applicable DfE requirements.

MUSIC AND INSTRUMENTAL TUITION

The Trust may charge for vocal or instrumental tuition provided individually or in groups where the tuition is provided at the request of the pupil's parent or carer and the charging requirements are met.

Charges will not exceed the cost of providing the tuition.

Charges will not be made where the tuition is an essential part of the National Curriculum.

The Trust will comply with any specific restrictions relating to publicly funded instrumental and vocal tuition programmes.

Where instrumental music tuition is provided by an external provider, the provider's charging arrangements must be consistent with this policy and applicable legislation.

RESIDENTIAL VISITS

The Trust may charge for board and lodging on residential visits, subject to the applicable legal requirements. The charge for board and lodging will not exceed the actual cost.

The Trust will not charge for education provided during a residential visit where the education itself is required to be provided without charge.

Where a residential visit includes both chargeable and non chargeable elements, charges will be calculated appropriately.

TRANSPORT

The Trust will comply with all legal requirements concerning transport.

The Trust will not charge for transport where it is legally required to provide transport for registered pupils.

The Trust may charge for transport forming part of a chargeable optional extra where permitted by law.

The Trust may also recover reasonable transport costs associated with chargeable activities where the law permits such charges.

EXAMINATION FEES

The Trust will meet examination entry fees for prescribed examinations where the pupil has been prepared for the examination at the academy.

Where a pupil has not been prepared for an examination at the academy, the Trust may charge the examination entry fee where permitted.

The Trust may charge for examination resits where the pupil has failed without good reason to meet an examination requirement and the applicable legal requirements allow such a charge.

Individual academies may set out further arrangements for examination entries and resits within their examination procedures.

MATERIALS AND PRODUCTS CREATED BY PUPILS

Where pupils are undertaking practical activities and wish to own the finished product, the Trust may ask parents or carers to provide or pay for the ingredients, materials or equipment required to produce it.

The Trust will ensure that no pupil is disadvantaged because their parent or carer is unwilling or unable to contribute.

LOSS, DAMAGE AND BREAKAGES

The Trust may seek reasonable reimbursement where property belonging to the Trust or an academy has been deliberately or maliciously damaged, lost or destroyed by a pupil.

Any request for payment will take account of:

- the circumstances of the incident;
- whether the damage or loss was deliberate or malicious;
- the age and circumstances of the pupil;
- the actual cost of repair or replacement; and
- whether recovery of the cost is reasonable and proportionate.

The Trust will not seek payment for normal wear and tear.

The Trust will not impose automatic or punitive charges unrelated to the actual loss or damage incurred.

Any charge will be reasonable and proportionate to the circumstances.

REMISSIONS AND FINANCIAL ASSISTANCE

The Trust recognises that some families may experience financial difficulty.

The Trust may also choose to provide financial assistance towards particular activities where this is considered appropriate and resources permit.

Parents and carers experiencing financial difficulty should contact the relevant academy or Trust contact as soon as possible to discuss available support.

Any discretionary assistance will be considered fairly and sensitively and will be subject to available funding.

The Trust will not discriminate against pupils because their parents or carers are unable or unwilling to pay a voluntary contribution.

PAYMENT ARRANGEMENTS

Parents and carers will be informed of the cost of chargeable activities and the arrangements for payment before the activity or service is provided.

The Trust may require payment in advance for chargeable activities.

Where appropriate, instalment arrangements may be offered for higher-cost activities.

The Trust may set reasonable deadlines for payment.

Where a parent or carer is experiencing financial difficulty, they should contact the academy before the payment deadline wherever possible.

The Trust will seek to deal with payment difficulties sensitively while ensuring that public funds are properly protected.

REFUNDS AND CANCELLATIONS

Refund arrangements will depend on the nature of the activity or service and the costs already incurred by the Trust.

Where the Trust cancels an activity, any refund will be considered in accordance with the circumstances and the amount of expenditure that can be recovered.

Where an individual pupil is unable to attend an activity, a refund will not automatically be available where the Trust has already incurred non refundable costs.

The Trust will communicate any specific cancellation and refund arrangements to parents and carers before chargeable activities take place.

FINANCIAL CONTROLS

All income generated through charges must be collected, recorded and accounted for in accordance with the Trust's Financial Regulations.

Charges must be reasonable, transparent and properly authorised.

Academies must ensure that income is appropriately recorded and reconciled through the Trust's financial systems.

VALUE FOR MONEY

When setting charges, the Trust will seek to ensure that costs are reasonable and proportionate.

Charges will not be used to generate a profit from activities where legislation restricts the amount that can be charged.

The Trust will seek value for money when procuring goods and services connected with chargeable activities.