



South Walney Infant and Nursery School

CHARGING AND REMISSIONS POLICY

This page is intentionally blank for printing purposes

Approved by ¹			
Name:	Becs Ensoll		
Position:	Head Teacher		
Signed:	BE		
Date:	Spring 2025	Version No:	11
Proposed review date ² :	Spring 2027		

KAHSC v11 – Rev September 2024

¹ The Governing Body is free to delegate the approval of this Policy to a Committee of the Governing Body, an individual Governor or the Head teacher

² The Governing Body are free to determine the review frequency of this Policy

Review Sheet

Each entry in the table below summarises the changes to this Policy made since the last review (if any).

Version Number	KAHSC Version Description	Date of Revision/Review
1	Original	January 2012
2	Reformatted only	February 2014
3	Updated to reflect DfE publication ' <i>Charging for school activities: Departmental advice for governing bodies, school leaders, school staff and local authorities</i> ', October 2014. New section for boarding schools, clarification on communication with parents and addition on Children Looked After and music tuition.	March 2015
4	Clarifications: S4 - enrichment activities that do not fulfil the definition of 'education'. S5 – what majority means, and that travel time counts. S6 – determining if a residential is an Optional Extra with examples & additional sources of funding e.g., trusts. S7 – participation is determined by payment.	April 2015
5	Introduction updated to reflect that many more schools have community facilities, and this policy does not apply to charges for them and to reflect that "first pay, first served" access to trips is discrimination against low-income families.	February 2016
6	Introduction updated to define remission and give examples; S9 – clarification that secondary schools must include a school milk scheme section if any pupils are up to and including the age of 18 <i>and</i> are entitled to free school meals.	April 2017
7	Updated to reflect DfE updated guidance (May 2018)	June 2018
8	Reviewed: No Legal or policy changes. What schools do or must do has not changed. Updated with a new section on school meals: a major policy clarification following acceptance by the DfE that school meals should be part of every school's charging and remissions policy because the government provides remission through UIFSM and FSM, governors have discretionary powers, and debt recovery must be managed. One minor clarification about school milk.	September 2020
9	Updated the review table page and replaced the FAQs with a link to the DfE document. No other changes or updates.	November 2022
10	No legal changes but significant updates to include new sections on responsibilities and nursery fee principles. No highlighting due to major reorganisation to cut content and improve clarity. Right click on the contents page to update fields after removing inapplicable sections.	September 2023
11	No legal changes. Updated to include suggested debt write-off amounts (in line with Westmorland & Furness Council limits – check your LA restrictions where relevant). New text on school meals debt that reflects the growing the use of online cashless catering and includes how persistent debts are recovered.	September 2024

Contents

1.	Policy Scope	1
1.1	Aims	1
1.2	Definitions.....	1
1.3	Associated policies and procedures.....	1
2.	Roles and responsibilities	1
2.1	The Governing Body/Trust Board	1
2.2	The Head teacher	2
2.3	Staff.....	2
2.4	Parents and carers	2
3.	When no charges will be made.....	2
3.1	Education	2
3.2	Transport	2
3.3	Educational visits	2
4.	Voluntary Contributions	2
5.	When charges will be made.....	3
5.1	Optional Extras	3
5.2	Music tuition.....	3
5.3	School Meals.....	Error! Bookmark not defined.
5.4	School milk scheme	3
5.5	Before and/or after school care	Error! Bookmark not defined.
5.6	Certain early years provision	3
5.7	Damage to property and breakages	Error! Bookmark not defined.
5.8	Boarding charges	Error! Bookmark not defined.
6.	Calculating charges and remission	4
6.1	Non-residential activities	Error! Bookmark not defined.
6.2	Residential activities	4
7.	Debt recovery	4
8.	Arrangements for monitoring and evaluation.....	4

1. Policy scope

Sections 449 to 462 of the [Education Act 1996 \(legislation.gov.uk\)](https://www.legislation.gov.uk/ukpga/1996/56) and [The Education \(School Sessions and Charges and Remissions Policies\) \(Information\) \(England\) Regulations 1999 \(legislation.gov.uk\)](https://www.legislation.gov.uk/uksi/1999/2614/pdfs/uksi_1999_2614_en.pdf) set out the law on charging and remissions for school activities in England and require schools to have a Policy on charging.

[The Education \(Charges for Early Years Provision\) Regulations 2012 \(legislation.gov.uk\)](https://www.legislation.gov.uk/uksi/2012/2694/pdfs/uksi_2012_2694_en.pdf) sets out when charges can be made for some early years provision.

This Policy is based on the law and Department for Education (DfE) guidance [Charging for school activities - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/344242/charging_for_school_activities_-_gov_uk.pdf).

Section 21 of the [Education Act 2002 \(legislation.gov.uk\)](https://www.legislation.gov.uk/ukpga/2002/26/pdfs/ukpga_2002_26_en.pdf) gives schools the power to provide community facilities or services for the (charitable) benefit of pupils or their families, or people who live or work locally. This Policy does not apply to charges we make for community facilities which are handled separately under hire agreements.

This Policy does not apply to charges made and determined by other organisations offering activities and services on the school premises e.g., a community club that hires our hall to meet in and charges its members to attend.

1.1 Aims

This Policy aims to ensure that:

- All pupils have full and free access to a broad and balanced curriculum regardless of their family's financial means.
- This school is transparent about the activities or items that can be charged for and when charges will be made, or remissions offered.
- We recognise our responsibility not to place undue pressure on family finances for example, by giving good notice about charges and by not offering activities on a 'first to pay, first served' basis.

1.2 Definitions

Charge: a fee payable for clearly defined items or activities.

Half-day school session: any period of 12 hours ending at noon or midnight (p9, DfE, 'Charging for school activities', 2018).

Remission: the cancellation of a charge which would normally be payable.

School hours: the hours when school is in session and which do not include the lunch break e.g., each weekday 8:54am-12:30pm and 1:15pm-3:15pm.

1.3 Associated policies and procedures

The following policies and procedures may impact the implementation of this Policy:

- Educational Visits Procedures
- Equality Policy
- Hire Procedures

2. Roles and responsibilities

2.1 The Governing Body/Trust Board

The Governing Body has overall responsibility for approving the Charging and Remissions Policy and delegates this to the Head Teacher.

The Governing Body also has overall responsibility for monitoring the implementation of this Policy.

2.2 The Head teacher

The Head teacher is responsible for ensuring staff are familiar with the Charging and Remissions Policy and that it is being applied consistently.

2.3 Staff

The Charging and Remissions Policy and how to implement it is included in the induction of new staff and the senior leadership team will provide updates or refresh training as necessary.

Our staff are responsible for:

- Implementing the Policy consistently.
- Notifying the Head teacher of any specific circumstances which they are unsure about or where they are not certain if the Policy applies.

2.4 Parents and carers

Parents and carers are expected to notify staff or the Head teacher of any concerns or queries regarding the Charging and Remissions Policy.

3. When no charges will be made

3.1 Education

There will be no charge for:

- Admission or applications for admission
- Education provided wholly or mostly 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 this school
 - Religious education

3.2 Transport

There will be no charge for:

- Transporting registered pupils to or from the school premises, where the local authority has a statutory obligation to provide transport
- Transporting registered pupils to other premises where the governing body or local authority has arranged for pupils to be educated
- Transport provided in connection with an educational visit

3.3 Educational visits

There will be no charge for:

- Education provided on any visit that takes place during school hours
- Education provided on any visit that takes place 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 this school
 - Religious education
- Supply staff to cover for those staff who are absent from school accompanying pupils on a residential visit.

4. Voluntary contributions

When charges do not apply, parents and carers may be asked for a voluntary contribution towards the cost of some of the educational opportunities that we offer such as:

- On site enrichment activities, educational visits and the associated transportation and other costs

4.1 Optional extras

In calculating the cost of optional extras an amount may be included for:

- Any materials, books, instruments, or equipment provided in connection with the optional extra.
- Non-teaching staff.
- Teaching staff engaged under contracts for services purely to provide an optional extra, this includes 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.

4.2 Music tuition

No charge will be made for vocal and musical instrument tuition for either an individual pupil or groups of any appropriate size when it is provided at the request of the pupil's parent.

National charging guidance will be followed, and no charge will be made in respect of a pupil who is looked after by a local authority (within the meaning of section 22(l) of the Children Act 1989).

We are committed to working together to find suitable payment plans for parents and carers in financial difficulties, and anyone experiencing this should speak to the Head teacher in the strictest confidence. We may be able to signpost families to extra government or community support in the immediate or short term.

Where no attempt is made to clear a school meals debt, we will take appropriate debt recovery action in accordance with our normal financial procedures (see section 7 for more information).

4.3 School milk scheme

Under [The Requirements for School Food Regulations 2014 \(legislation.gov.uk\)](https://www.legislation.gov.uk) all schools must make lower fat milk or lactose reduced milk available to drink at least **once** a day during school hours or the lunch break at a fair cost or free of charge to all pupils who are entitled.

Up to one third of a pint of milk is available to all children free of charge, regardless of their family circumstances up to the age of 5.

When a child has their 5th birthday, a small charge will be made towards the cost of continuing to provide this single portion of milk to those parents and carers who want their children to continue receiving it.

Children who have reached the age of 5 and have not yet reached the age of 19 can continue to receive up to one third of a pint of milk free of charge if their family has been able to successfully [apply for free school meals - GOV.UK \(www.gov.uk\)](https://www.gov.uk/apply-for-free-school-meals).

In the case of infant pupils who are entitled to a universal infant free school meal, milk must be offered free to those pupils **if** it forms part of the school lunch. If milk is offered at any other time during the school day instead, it will only be free for those infants who have an underlying income-related entitlement to free school meals.

A parent or carer who wishes their child to receive more than one portion of milk per day must pay the full cost of each additional portion, even when their first portion is free due to an entitlement.

For more information about our milk scheme and the current charges, please see Cool Milk website or ask at the school office.

4.4 Certain early years provision

Government funding covering the cost of delivering 15 or 30 hours a week of free, high quality, flexible childcare for children aged 3-4 years does not include the cost of meals, snacks, consumables such as nappies or sunscreen, additional hours or additional services such as trips or outings for which there will be charges.

5. Calculating charges and remission

The principles of best value will be applied when planning activities that incur costs to school and/or charges to parents and carers.

When charges are made for activities, they will be based on the actual costs incurred, divided by the total number of pupils participating. There will be no levy on those who can pay to support those who can't. Support for cases of hardship will come through applicable funding such as pupil premium money, specified voluntary contributions and fundraising.

6. Debt recovery

Our financial management Policy requires all services provided by us to be paid for in advance so it is expected no significant debts will accrue. In the event that debts are accrued, the Governing Body/Trust Board has authorised all reasonable measures to be taken to collect debts as part of its management of public funds. In doing so they will observe the relevant financial regulations and any other legal requirements.

Staff whose role it is, will follow school procedures to secure the collection of all debts.

A debt will be written off only after all reasonable measures (commensurate with the size and nature of the debt) have been taken to recover it. Only debts below that allowed for in the annual funding letter issued by the Secretary of State may be written off. The recovery of any sums above this amount will be referred first to the Governors/Trustees and then to the Secretary of State for approval. If any debtor has a number of debts that together exceed the write-off limit, then these will be treated as a total amount.

Unless a decision to write-off a debt is demonstrably a reasonable course of action authorisation is in place to initiate legal or other action to recover debts.

A formal record of any debts written off will be maintained and retained for 7 years.

7. Arrangements for monitoring and evaluation

To ensure we achieve the aims of this Policy, the finance committee will monitor its impact by receiving on a termly basis, a financial report on activities that resulted in charges being levied, what remission was provided and why (without giving names) and the source of remissions.