



Leodis  
Academies  
Trust

# **CHARGING AND REMISSION POLICY**

Policy Details	
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Document History			
Version	Date	Author	Note of Revisions
1.0	July 2017	Finance Director	Approved by Trustees 6 July 2017
2.0	Oct 2022	CFO	New Trust format Updates: 5.2 – Finance and Risk Committee 5.3 – CEO Principal 5.8 – Employees 8.2 – Items where charges may be made 9.0 – Voluntary contributions Appendix 1 – Annual charging schedules
3.0	Oct 2023	CFO	Contents page formatted. Date on Appendix 1 – Approval of Annual Charging Schedule.
4.0	Oct 2024	CFO	Trust branding update. Appendix 1 – Annual Schedule of Charges.

4.1	Nov 2024	CFO	Updates made to the name of the Local Governing Board to Local Committee and Local Advisory Board to Local Committee (Advisory) to reflect the changes to the roles and responsibilities outlined in the Academy Trust Governance Guide 2024.
5.0	Sept 2025	CFOO	Updated version for 2025 Removal of reference to Local Committee (Advisory) Re Appendix 1 – Annual Schedule of Charges

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## **1 INTRODUCTION:**

- 1.1 This policy applies to all financial activities undertaken by Leodis Academies Trust (the Trust) and its academies.
- 1.2 It forms part of the Leodis Academies Trust compliance framework.

## **2 AIMS:**

- 2.1 This policy sets 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.

## **3 STATUTORY GUIDANCE:**

- 3.1 This policy is written with reference to the latest version of the [Academies Financial Handbook](#) and the [Governance Handbook](#)

## **4 LINKS TO TRUST/ACADEMY POLICIES:**

- 4.1 A number of Academy/Trust policies make reference to financial management and these include the following policies:
- Scheme of Delegation.
  - Wraparound Care Policy.
  - Letting Charges Policy.
  - Educational Visits Polciy
- 4.2 This list of policies is not exhaustive, and this policy should be applied to all activities undertaken by the Trust and its academies.

## **5 ROLES AND RESPONSIBILITIES:**

### **5.1 The Board of Trustees:**

- 5.1.1 The Board of Trustees is responsible for determining the content of this policy in line with statutory guidance.

### **5.2 Finance and Risk Committee:**

5.2.1 The Finance and Risk Committee (FRC) review this policy every three years, or if when specific guidance is issued, and make recommendations to the Board of Trustees for its approval.

5.2.2 The Finance and Risk Committee will review and approve the annual schedule of charges for all academies within the Trust.

### **5.3 The CEO Principal:**

5.3.1 The CEO Principal is responsible for ensuring that the Charging and Remissions policy is implemented across the Trust.

### **5.4 The Local Committee (LC):**

5.4.1 The LC is responsible for supporting senior leaders. The LC and Principal of each Academy are responsible for the implementation of the Charging and Remission Policy within their Academy.

5.4.2 The LC may remit in full or in part charges in respect of a student/ pupil, if it feels reasonable in the circumstances. Information will be provided by the Principal, with advice from the CFOO, to enable a decision to be made in a fair and consistent manner across the Trust.

5.4.3 The LC may decide not to levy charges in respect to a particular activity if it feels reasonable in the circumstances. Information will be provided by the Principal, with advice from the CFOO, to enable a decision to be made in a fair and consistent manner across the Trust.

5.4.4 The LC may decide to ask for voluntary contributions for a planned activity. They are responsible for determining the total amount of the voluntary contributions required for the activity to go ahead. The LC can suggest a recommended amount of voluntary contribution for each activity.

### **5.5 The Principal:**

5.5.1 The Principal is responsible to their LC for implementing the Charging and Remission Policy within their Academy, including the Annual schedule of charges approved by the Finance and Risk Committee.

5.5.2. The Principal is responsible for liaising with the CFOO to provide information to the LC to enable them to make decisions about remitting charges, not levying charges, and voluntary contributions as required at sections 5.4.2, 5.4.3 and 5.4.4.

- 5.5.3 The Principal is responsible for ensuring parents are informed of any charges to be levied, any agreed remissions or any requests for voluntary contributions in line with this policy.

## **5.6 Trust Central Team:**

- 5.6.1 The CFOO is responsible for coordinating and monitoring the implementation of the Charging and Remission policy across the Trust and its academies.
- 5.6.2 The CFOO should be consulted to provide advice if there are any issues arising from the implementation of the policy.
- 5.6.3 The CFOO will provide information to the Principals and LC to enable them to make decisions about remitting charges, not levying charges, or asking for voluntary contributions as required at sections 5.4.2, 5.4.3 and 5.4.4.
- 5.6.4 The CFOO will co-ordinate the Annual Schedule of Charges as per section 6 and present it to the FRC for approval in line with section 5.2.2.

## **5.7 Employees:**

- 5.7.1 Staff are responsible for complying with the Charging and Remission Policy and procedures.

## **6 ANNUAL SCHEDULE OF CHARGES:**

- 6.1 The Trust, via the FRC will agree the Annual Schedule of Charges.
- 6.2 This will include:
  - 6.2.1 The prices charged for school meals at primary academies where the catering service is provided in-house.
  - 6.2.2 The price to be charged for school meals at secondary academies where the catering service is provided in-house.
  - 6.2.3 The price to be charged for school meals where the catering service is provided by a PFI provider.
  - 6.2.4 Any other agreed charges as identified in section 8.
- 6.3 Any charges agreed outside of the Annual Schedule of Charges will be determined as described at sections 5.4.1, 5.4.2 and 5.4.3.

## **7 ITEMS THE TRUST CANNOT CHARGE FOR:**

### **7.1 Legislation prohibits charges being raised for the following:**

- 7.1.1 Education provided during school hours (including the supply of any materials, books, instruments or other equipment)
- 7.1.2 Education provided outside school hours if it is part of the National Curriculum, or part of a syllabus for a prescribed public examination that the student/pupil is being prepared for at the school, or part of religious education.
- 7.1.3 Tuition for students/pupils learning to play musical instruments, if the tuition is required as part of the National Curriculum, or part of a syllabus for a prescribed public examination that the student/pupil is being prepared for at the school, or part of religious education.
- 7.1.4 Entry for prescribed public examination, if the student/pupil has been prepared for it at the school.
- 7.1.5 Examination re-sits, if the student/pupil is being prepared for it at the school.
- 7.1.6 Education provided on any trip that takes place during school hours.
- 7.1.7 Education provided on any trip that takes place outside school hours if it is part of the National Curriculum, or part of a syllabus for a prescribed public examination that the student/pupil is being prepared for at the school, or part of religious education.
- 7.1.8 Staff costs to cover those staff who are absent from school accompanying pupils on a residential trip.
- 7.1.9 Transporting registered students/pupils to or from the school premises, where the local authority has a statutory obligation to provide transport.
- 7.1.10 Transporting registered students/pupils to other premises where the Trust, LC or local authority has arranged for pupils to be educated.
- 7.1.11 Transport that enables a student/pupil to meet an examination requirement when he or she has been prepared for that examination at the school.
- 7.1.12 Transport provided in connection with an educational trip.

## **8.0 ITEMS WHERE CHARGES WILL OR MAY BE MADE:**

## **8.1 Charges will be made for the following items:**

- 8.1.1 Board and lodging on residential visits (not to exceed the costs).
- 8.1.2 The proportionate costs for an individual child for activities ('optional extras') wholly or mainly outside school hours including:
- Travel.
  - Materials and equipment.
  - Entrance fees.
  - Insurance costs.
- 8.1.3 Vocal and musical instrument tuition.
- 8.1.4 Re-sites for public examinations at the request of the student/pupil or parent.
- 8.1.5 Examination fees where a student/pupil fails without good reason to sit the exam.
- 8.1.6 Any other education, transport or examination fee unless charges are specifically prohibited.
- 8.1.7 Revision guides.
- 8.1.8 Breakages and replacements as a result of damage caused willfully or negligently by students/ pupils.
- 8.1.9 Damage/vandalism/loss to and of school property.

## **8.2 Items where charges may be made**

- 8.2.1 Extra-curricular activities and school clubs.
- 8.2.2 Any extended school activity including wraparound care (arrangements for wraparound care charges are contained in the Wraparound Care Policy).
- 8.2.3 Community Use/Lettings (arrangements for the letting of school premises and charges are contained in the Letting Charges Policy).
- 8.2.4 Locker deposits/charges.
- 8.2.5 Catering including school meals (with the exception of those eligible for UIFSM and FSM).

- 8.2.6 Trustees reserve the right to charge for other items or services as required within the scope of this policy as the need arises. This may include but is not limited to: replacement items such as planners, face masks, etc. up to the cost of provided such item(s) or service(s).

## **9.0 VOLUNTARY CONTRIBUTIONS:**

- 9.1 The Trust reserves the right to ask for voluntary contributions to general school funds or to fund specific activities in line with section 5.4.3.
- 9.2 Voluntary contributions may be requested for:
- 9.2.1 Educational visits that are non-residential.
  - 9.2.2 Educational visits taking place during school time that are residential.
  - 9.2.3 Special events involving visiting artists, or experts to school (e.g. theatre groups, musicians, planetariums) where there is a cost to the school.
  - 9.2.4 Ingredients for baking/cooking where the product will be taken home by students/ pupils.
- 9.3 The terms of any request made to parents will specify that it is a voluntary contribution and in no way represents a charge, that the contribution is genuinely voluntary and a parent is under no obligation to pay.
- 9.4 Students/pupils will not be treated differently according to whether or not their parents have made any contribution in response to the request or invitation.
- 9.5 Where there are not enough voluntary contributions to make the activity possible, then it may be cancelled.

## **10 REMISSIONS:**

- 10.1 Students/pupils whose parents are in receipt of the following support payments will, in addition to having a free school meal entitlement, also be entitled to a remission of charges for board and lodging costs for those trips deemed to be compulsory for curriculum delivery:
- Income support.
  - Income Based Jobseeker's Allowance.
  - Income-related Employment and Support Allowance.

- Support under Part VI of the Immigration and Asylum Act 1999.
- The guaranteed element of Pension Credit.
- Child Tax Credit (provided you are not also entitled to Working Tax Credit and have an annual gross income of no more than £16,190).
- Working Tax Credit run-on - paid for 4 weeks after you stop qualifying for Working Tax Credit.
- Universal Credit - if you apply on or after 1 April 2018 your household income must be less than £7,400 a year (after tax and not including any benefits you get).

10.2 The criteria stipulated at section 10.1 is based on the information provided at the time of publication and the Trust reserves the right to use the current criteria published at [Apply for free school meals - GOV.UK \(www.gov.uk\)](#) should this be different.

10.3 Applications for other remissions should be made in writing to the Principal and will be reviewed in line with sections 5.4, 5.5 and 5.6 of this policy.

# APPENDIX 1: ANNUAL CHARGING SCHEDULE

This was approved at FRC 11 June 2025 and includes Trust wide Lettings, Catering and Extended Schools Charges.