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Ethos Academy Trust

Charges & Remissions Policy

2025-2026

ETHOS ACADEMY TRUST

Nurturing inclusive learning communities

1	**Summary**	Charges & Remissions Policy
2	**Responsible person**	CFO
3	**Accountable ELT member**	CFO
4	**Applies to**	☒All Staff ☐Support Staff ☐Teaching Staff
5	**Trustees and/or individuals who have overseen development of this policy**	Victoria Evans - CFO
6	**Headteachers/Service Heads who were consulted and have given approval (if applicable)**	N/A
8	**Ratifying committee(s) and date of final approval**	Finance, Audit & Risk Committee (FARC) 27/11/2025
9	**Version number**	2.2
10	**Available on**	Every ☒Y ☐N Trust Website ☐Y☒N Academy Website ☒Y☐N Staff Portal ☐Y☒N
11	**Related documents (if applicable)**	[Charging for school activities] Academy Trust Handbook 2025 DfE Statutory Guidance on charging for school activities Education Act 1996 (Section 449-462) Education and Inspections Act 2006 Equality Act 2010 The Charges for Music Tuition (England) Regulations 2007
12	**Disseminated to**	☐Trustees ☒All Staff ☐Support Staff ☐Teaching Staff
13	**Date of implementation (when shared)**	3rd December 2025
14	**Date of next formal review**	November 2026
15	**Consulted with Recognised Trade Unions**	☐Y ☒N

Date	Version	Action	Summary of changes
November 2022	1.9	Policy revision	No Changes necessary
November 2023	2.0	Policy revision	Minor changes to incorporate Executive Head and HoS in addition to Headteacher.
November 2024	3.0	Policy revision	No Changes necessary – links to external sites updated.
November 2025	4.0	Policy revision	Change of CFOO to CFO Updated Related documents & 1.1 to include the policy references explicitly. 4.1 include line on exceeding actual cost. 4.11 third party services should at cost. 4.13 added as new DfE transparency requirement 5.1 updated to reflect Trust discretion 5.2 no change.

Contents

1.0 Introduction

1.1 The Trustees of Ethos Academy Trust recognise the valuable contribution that a wide range of additional activities can make towards a pupil's education. This policy complies with the Education Act 1996 (Sections 449–462), Education and Inspections Act 2006, Equality Act 2010, the Academy Trust Handbook 2025, the Charges for Music Tuition (England) Regulations 2007 and the latest DfE statutory guidance on charging for school activities. The Board aims to promote and provide such activities as part of a broad and balanced curriculum and optional extras.

1.2 There are two types of financial contributions for which parents/carers may be asked:
- Voluntary contributions
- Permitted charges

1.3 Charges will never exceed the actual cost of the activity and will not include any element of profit.

2.0 Activities Without Charge

2.1 No charge will be made for:

- Education provided wholly or mainly during school hours, including materials, books, instruments, equipment, and transport.
- Education outside school hours if part of the National Curriculum or core offer.
- Instrumental/vocal tuition if part of the core offer.
- Entry for prescribed public examinations, including re-sits, if prepared at a Trust academy

3.0 Voluntary Contributions for Educational Activities

3.1 Nothing in legislation prevents an Academy Trust from asking for voluntary contributions for the benefit of the Trust or any Trust activities. However, if the activity cannot be funded without voluntary contributions, the Trust, Executive Head or Headteacher should make this clear to parents and carers at the outset. The Executive Head/ Headteacher **must** also make it clear to parents and carers that there is no obligation to make any contribution.

3.2 It is important to note that no child should be excluded from an activity simply because his or her parents or carers are unwilling or unable to pay. The Trust and/or its academies must make sure that they make this clear to parents and carers. If a parent/carer is unwilling or unable to pay, their child must still be given an equal chance to go on the visit. The Trust and /or its academies should make it clear to parents and carers at the outset what their policy for allocating places on each visit will be. Additional charges **will not** be levied to those parents and carers who do pay to subsidise any other pupils wishing to participate in the activity whose parents and carers/carers are unwilling or unable to pay the full charge.

3.3 When making requests for voluntary contributions to the Trust funds, parents and carers must not be made to feel pressurised into paying as it is voluntary and **not**

compulsory. The Trust and its academies should avoid sending letters to parents and carers via pupils reminding them that they have not paid. The Trust and its academies should also ensure that direct debit or standing order mandates are not sent to parents and carers when requesting for contributions.

4.0 Permitted Charges

4.1 Permitted charges are a direct request to cover certain costs involved with a Trust activity or visit. Whilst no charge can be made in respect of education provided during school hours (which excludes the midday break), a charge may be made however for board and lodgings on any residential educational visit. Any optional extra activity (e.g., trips, music tuition) must not exceed the actual cost of providing the activity divided equally by the number of participants and must not include an element of subsidy for any other pupils whose parents are unable or unwilling to pay.

Materials & Textbooks

4.2 Where a pupil or parent wishes to retain items produced as a result of art, craft and design, or design and technology, a charge may be levied for the cost of the materials used. Textbooks are provided free of charge.

Music Tuition

4.3 Although the law states that all education provided during school hours must be free, music tuition is an exception to this rule within the state education sector.

4.4 The Education and Inspections Act 2006 introduced a regulation-making power which allowed the Department for Education to specify circumstances where charging can be made for music tuition. The new Regulations, which came into force in September 2007, provide pupils with greater access to vocal and instrumental tuition.

4.5 Charges may now be made for teaching either an individual pupil or groups of any appropriate size (provided that the size of the group is based on sound pedagogical principles) to play a musical instrument or to sing. **Charges may only be made if the teaching is not an essential part of either the National Curriculum or a public examination syllabus being followed by the pupil(s), or the first access to the Key Stage 2 Instrumental and Vocal Tuition Programme (Wider Opportunities).** At Ethos Academy Trust currently, all music tuition forms part of our core curriculum offer and is therefore free of charge.

Residential Activities/Activities Outside School Hours

4.6 If the activity is held outside school hours and is education other than non-chargeable education, then it is regarded as an “optional extra”. A charge may be made for the full cost of the activity but must not exceed the actual cost of providing the activity. The charge may include the costs of travel, board and lodgings, additional staff costs, entrance fees, materials and equipment. However, the charge made to individual parents and carers cannot include any cost added to subsidise parents and carers of children who are unwilling or unable to pay the charge.

4.7 *When is an activity held in school hours?*

If the number of academy sessions taken up by the visit is equal to or greater than 50% of the number of half days spent on the visit, it is deemed to have taken place during school hours (even if some activities take place late in the evening). Whatever the starting and finishing times of the school day, regulations require that the school day is divided into 2 sessions. A “half day” means any period of 12 hours ending with noon or midnight on any day.

Example 1: Visit during school hours

4.8 Pupils are away from noon on Wednesday to 9pm on Sunday. This counts as 9 half days including 5 school sessions, so the visit is deemed to have taken place during school hours.

Example 2: Visit outside school hours

4.9 Pupils are away from noon on Thursday until 9pm on Sunday. This counts as 7 half days including 3 school sessions, so the visit is deemed to have taken place outside school hours.

Damage/Loss to Property

4.10 A charge may be levied in respect of wilful damage, neglect or loss of Trust property (including premises, furniture, equipment, books or materials), the charge to be the cost of replacement or repair, or such lower cost as the Headteacher may decide.

Other charges

4.11 The Trustees, Executive Team, Headteacher or Head of School may levy a charge on a third party or related party for miscellaneous services up to the cost of providing such services including reasonable overheads, e.g., for providing consultancy services, hire of premises or other activities permitted within the funding agreement. For details on services and associated costs, please contact the Chief Financial Officer (CFO).

4.12 For requests of copies of documents, the Trust will levy a charge of 10p per sheet for a copy of any document which exceeds 10 pages in length.

4.13 To comply with new DfE transparency requirements, the Trust will publish a clear price list of all chargeable 'optional extras' on the Trust/Academy websites. Furthermore, the Trust will ensure all invoices to parents are fully itemised, breaking down free entitlement, additional paid hours, food, consumables, and activity charges. Both measures will be effective by January 2026.

5.0 Remissions

Optional Extras

5.1 Where the Trust levies charges for optional extras, parents and carers may be eligible to receive a remission for the whole or a part of the charge. The criteria for remissions will be clearly communicated when a charge is requested.

5.2 Pupils who are eligible for **Pupil Premium** funding may receive a complete remission of any charges that would otherwise be payable for board and lodgings during a residential visit, provided the education on that visit is non-chargeable.

Government guidance providing full details of the benefits which exempt parents and carers from being charged can be found at: [Charging for school activities]