



Mercia
Learning Trust

Charging and Remissions

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DOCUMENT CONTROL

Unless there are legislative or regulatory changes in the interim, this policy will be reviewed annually. Should no substantive changes be required at that point, the policy will move to the next review cycle.

Version	Date	Changes
1.1	09/2023	<ul style="list-style-type: none">• Reviewed and updated to ensure policy reflects trust governance and reference to other policies is correct
1.2	09/2024	<ul style="list-style-type: none">• Transferred to new template
1.3	09/2025	<ul style="list-style-type: none">• Reviewed and replaced references to 'ESFA'
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1. Purpose

- 1.1. Mercia Learning Trust ("our Trust") recognises the valuable contribution that the wide range of additional activities, including trips, clubs and residential experiences can make in expanding the pupil experience and aims to promote and provide such activities both as part of a broad and balanced curriculum and as additional optional activities.

2. Aims

- 2.1. We are committed to adhering to legal requirements regarding charging for school activities, and meeting all statutory guidance provided by the DfE.
- 2.2. Our aim is therefore not to charge for education provided during school hours, to set 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 and carers.

3. Legislation and Guidance

- 3.1. This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:
 - 3.1.1. Education Act 1996
 - 3.1.2. The Charges for Music Tuition (England) Regulations 2007
 - 3.1.3. The Education (Prescribed Public Examinations) (England) Regulations 2010
 - 3.1.4. Freedom of Information Act 2000
 - 3.1.5. DfE 'Charging for school activities'
 - 3.1.6. DfE 'Governance handbook'
 - 3.1.7. Our Trust's Funding Agreement
 - 3.1.8. DfE 'Academy Trust Handbook'

4. Charges – Parents

- 4.1. Our Trust reserves the right to make a charge for the following activities which may from time to time be organised by our schools:

4.1.1. Taking place during school hours

- 4.1.1.1. Where a charge is made for musical instrument tuition, the parent/carer will be invoiced direct by the provider of the tuition in advance of the lessons and the 'contract' underlying that activity will be between the provider concerned and the parent.
- 4.1.1.2. School's will charge cost only for items such as school uniform from external suppliers.
- 4.1.1.3. Loss of, damage to or breakage of school property, e.g. books, windows, furniture, scientific equipment etc will be charged for if caused by negligence or deliberate act. The charge will be the cost of replacement or repair, or such lower cost as the headteacher may decide.
- 4.1.1.4. Similarly, a charge will be levied in respect of wilful damage, neglect or loss of property belonging to a third party where the cost has been recharged to the school.
- 4.1.1.5. Examination re-sits, re-marks and clerical checks requested by the pupil, An examination for which the pupil has not been prepared by the school where the pupil fails without good reason (in the judgement of the governing body) to meet the requirement of any public examination e.g. by non-attendance and where the school originally paid the entry fee. The charge will comprise the fee levied by the Examinations Board, plus an administration fee to be retained by the school.
- 4.1.1.6. Parents/carers may be required to meet the cost of transport from home to an activity sanctioned but not provided by the school e.g. travel to work experience.

4.1.2. Taking place outside school hours

- 4.1.2.1. There is no charge for activities that take place outside of school hours when they are:
 - 4.1.2.1.1. part of the national curriculum, including sports matches against other schools.
 - 4.1.2.1.2. part of the syllabus for a prescribed public examination that the pupil is being prepared for by the school.

4.1.2.1.3. part of religious education.

4.1.3. For other activities not necessary to meet requirements of the school curriculum outside school hours the charge will be set to cover the cost of such items as:

4.1.3.1. transport/travel costs.

4.1.3.2. board and lodging.

4.1.3.3. entrance fees.

4.1.3.4. any materials required for the activity.

4.1.3.5. incidental expenses.

4.1.3.6. extended day services.

4.1.4. Any charge made in respect of individual pupils will not exceed the actual cost of provision and will not subsidise any other pupil participating.

4.1.5. Any remission of charges for individual pupils would be met from the main school budget or school fund depending on the activity and circumstances.

4.1.6. A pupil's participation in the activity is dependent on the agreement of their parent/carer to meet the cost of the activity, and this agreement will be a pre-requisite to the pupil's inclusion.

4.1.7. Parents will be notified in advance of any 'optional extras' which the school proposes to organise and the estimated cost. Parental consent will be obtained if their children are to participate in any activities for which a charge may be made.

4.1.8. In calculating the cost of optional extras an amount may be included in relation to:

4.1.8.1. any materials, books, instruments or equipment provided in connection with the optional extra.

4.1.8.2. associate staff

4.1.8.3. teaching staff engaged under contracts for services purely to provide an optional extra, including supply teachers engaged specifically to provide the optional extra.

4.1.8.4. the cost, or a proportion of the costs, for teaching staff employed to provide tuition in playing a musical instrument, where the tuition is an optional extra.

4.2. Other Charges

4.2.1. School meals - there is no charge for pupils who are entitled to free school meals or infant free school meals. Pupils who are not entitled to free school meals will be charged.

4.2.2. Wrap around care - please see individual school's Wrap Around Care Policy for details on charges, cancellations and refunds.

4.2.3. Extended services - our Trust is dedicated to providing a well-rounded and extensive education for our pupils which includes a wide range of extra-curricular activities. Charges are set within ParentPay (or Bromcom) for parents to opt into the optional service. Extended services enable our schools to provide high quality learning opportunities and increase pupil engagement. Charges are made to assist in providing necessary equipment for these services.

4.3. Activities that take place partly during school hours either on or off site

4.3.1. Where an activity takes place partly during and partly outside school hours, a charge will only be made for the activity outside school hours if it is not part of the national curriculum, not part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school and not part of religious education.

4.3.2. If 50% or more of the time spent on the activity occurs during school hours, it is deemed to take place during school hours and charging will be as outlined in Section 4.1.2, taking place outside of school hours.

4.3.3. Where the majority of a non-residential activity, more than 50%, takes place outside school hours, the charge cannot include the cost of alternative provision for those pupils who do not wish to participate. So, no charge can be made for supply teachers to cover for those teachers who are absent from school accompanying pupils on a visit.

4.3.4. Time spent on travel is included in this calculation if the travel itself occurs during school hours. School hours do not include the break in the middle of the day.

5. No Charges – Parents

- 5.1. Education provided during school hours will be free of charge. School hours are as published by the school in its prospectus and on its website.
- 5.2. No charge will be made for books, materials or equipment deemed necessary to meet the requirements of the school curriculum.
- 5.3. Anything that is part of the syllabus of a prescribed public examination.
- 5.4. Charges will not be made for class musical tuition during school hours or out of school hours where it forms part of the syllabus for a prescribed public examination or is required as part of the national curriculum.
- 5.5. To fulfil statutory requirements of the national curriculum or of religious education in which case no charge may be made other than for board and lodging on a residential visit.
- 5.6. No charge will be made for a pupil's first entry to a prescribed public examination for which the pupil has been prepared at the school, whether during or outside school hours.
- 5.7. An admission application.
- 5.8. Supply teachers to cover for those teachers who are absent from school including for accompanying on a school trip.

6. Voluntary Contributions – Parents

- 6.1. Voluntary contributions may be requested to enable our schools to run extra activities including visits which are educationally desirable. Our schools will make it clear in their communication to parents that these contributions are voluntary, and that no pupil will be treated differently according to whether or not the parent/carer has contributed. It will also be made clear that if insufficient funds are received to cover the cost of the activity, it may be cancelled.
- 6.2. Parents/carers may be invited to make a financial contribution to the school fund which will be used to:
 - 6.2.1. acquire educational resources and fixed assets which would otherwise be unaffordable from the school's main budget.
 - 6.2.2. subsidise a pupil participating in an activity outside school hours where that pupil's parent/carer is experiencing severe financial hardship.
- 6.3. From time to time an appeal may be launched by the governing body in order to help finance a particular capital project. It will be made clear in all correspondence to parents/carers inviting contributions to school fund or to individual appeals that such contributions are wholly voluntary.

7. Remission of Charges

- 7.1. To remove financial barriers, some activities and visits where charges can be made, will be offered at no cost or a reduced cost to parents/carers in receipt of certain benefits, for example, Universal Credit. Other exceptional cases where parents are not on benefits, may also be considered.
- 7.2. Parents/carers may apply to the school for remission (also known as a subsidy or waiver) of charges in whole or part towards the charges for activities or the purchase of uniform items. The school may choose to subsidise part or all of the payment of some charges for certain activities and pupils, and this will be determined by the headteacher.
- 7.3. To qualify for help, parents/carers must contact the headteacher or their child's head of year and if requested, proof of their income or benefit may be required.
- 7.4. Parents who are eligible for the remission of charges will be dealt with confidentially.
- 7.5. A decision will be made based on individual circumstances as to what level of support the school can offer or which items of uniform will be provided free of charge.
- 7.6. In the case of any uniform subsidy, the pupil must at least have more than one term of compulsory education or be starting at the school the following term.
- 7.7. Priority will be given to those entitled to free school meals and essential curriculum related activities in the first instance and each case will be considered on its merits.

8. Refunds

- 8.1. Where a charge has been levied for an educational visit or activity and the pupil cancels this place, no refund will be repayable to the parent or pupil if the school/trust has incurred a cost, e.g. paid this to the travel company.

- 8.2. The exception to this is a medical condition preventing the pupil from attending the educational visit or activity, under these circumstances a full refund may be repayable on presentation of an appropriate medical certificate and with the agreement of our trust's insurers.
- 8.3. If no cost has been incurred by the school/trust, a proportion of the funds paid may be returned to the parent/carer or pupil after the non-refundable deposit has been deducted.
- 8.4. A full refund is payable to all parent/carers should the cancellation be made by school.

9. Lockers

- 9.1. A returnable deposit of £5.00 will be charged for a school locker key and a 'rental charge' may also be levied.
- 9.2. It will be made clear that lockers are not compulsory and that lockers will be provided on a first come first served basis and by application only. Lockers must be re-applied for at the beginning of each school year.

10. Third Party Charges

- 10.1. Lettings
 - 10.1.1. Charged at a commercial rate, dependent on the site and facilities hired.