

St Mark's Catholic School



CHARGING AND REMISSIONS POLICY

Effective Date:	Review Date:	Prepared by:	Designated SLT:	Governor's Committee:
June 2025	August 2027	WSH	MLO/WSH	Finance & Resources

REVISED IN LINE WITH THE AUGUST 2026 STATUTORY MODEL

Our Mission:

St Mark's is a Catholic community inspired by Gospel values where relationships are rooted in love. At the heart of our mission is a commitment to live out our faith and a dedication to embrace excellence in all that we do. We believe in education that instils possibilities, transforms lives and enables all to fulfil their potential.

1. AIMS

Our school aims to:

- Maintain robust, clear, and transparent processes for charging and remissions.
- Clearly set out the types of activity that can be charged for, alongside exact definitions of when charges will and will not be made.
- Offer a rich, visually and academically stimulating range of extracurricular activities and visits, while actively minimising the financial barriers that may prevent some pupils from taking full advantage of these educational opportunities.

2. LEGISLATION AND GUIDANCE

This policy is drafted in accordance with sections 449 to 462 of the Education Act 1996, which set out the law on charging for school activities in England. It complies with the Education Reform Act 1988, Department for Education (DfE) guidance on "Charging for school activities" (2018), and incorporates The Charges for Music Tuition (England) Regulations 2007.

As a maintained school, St. Mark's is legally prohibited from charging for education provided during school hours, subject to the highly specific statutory exceptions detailed in Section 6 of this policy.

3. DEFINITIONS

Charge: A fee legally payable for specifically defined activities or optional services.

Remission: The partial or complete cancellation of a charge that would otherwise be payable in accordance with school policy.

4. ROLES AND RESPONSIBILITIES

4.1 The Governing Board

The Governing Board has overall responsibility for approving this Charging and Remissions Policy. Responsibility for approving and monitoring implementation has been delegated to the Governors' Finance Committee. The board monitors charges and remissions to ensure complete statutory compliance.

4.2 The Headteacher

The Headteacher is responsible for ensuring that all staff are fully familiar with the charging and remissions policy and that its guidelines are applied consistently across all departments and activities.

4.3 Staff

All staff are responsible for implementing this policy consistently. Staff must notify the Headteacher or School Business Manager of any specific circumstances they are unsure about or where they are not certain if the policy applies. The school will provide staff with appropriate information and training regarding this policy.

4.4 Parents and Carers

Parents and carers are expected to notify staff or the Headteacher of any concerns, queries, or financial difficulties regarding the application of this policy. The school strongly encourages open communication to resolve any billing issues or support queries sensitively.

5. ACTIVITIES AND PROVISIONS THAT CANNOT BE CHARGED FOR

The school governing body cannot charge for:

5.1 Education

- Admission applications to any state-funded school.
- Education provided 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, part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education.
- Instrumental or vocal tuition for pupils learning individually or in groups, unless the tuition is provided specifically at the request of the pupil's parent/carers.
- Entry for a prescribed public examination, if the pupil has been prepared for it at the school.

- Examination re-sits if the pupil is currently being prepared for the re-sit at the school.

5.2 Transport

- 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 board or local authority has arranged for pupils to be educated.
- Transport that enables a pupil to meet an examination requirement when prepared for that exam at the school.
- Transport provided in connection with an educational visit.

5.3 Residential Visits

- 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, part of a syllabus for a prescribed public examination, or part of religious education.
- Supply teachers covering for teachers who are absent from school accompanying pupils on a residential visit.

6. ACTIVITIES AND PROVISIONS THAT CAN BE CHARGED FOR

The school can legally charge for the following activities and services:

6.1 Education and Materials

- Any materials, books, instruments, or equipment where the parent/carer wishes their child to own them (see Practical Subjects in Section 9).
- Optional extras (see Section 6.2 below).
- Music and vocal tuition, in limited, parent-requested circumstances (see Section 6.3).
- Certain early years and community facilities provision.
- Examination re-sit fees if the pupil is being prepared for the re-sit at the school but fails, without good reason, to meet any examination requirement for a syllabus.

6.2 Optional Extras

We are able to charge for activities known as 'optional extras'. In these cases, schools can charge for providing materials, books, instruments or equipment. The following are optional extras:

- Education provided outside of school time that is not part of the National Curriculum, part of a syllabus for a public examination being prepared at school, or part of religious education.
- Examination entry fees if the registered pupil has not been prepared for the exam at the school.
- Transport that is not required to take the pupil to school or arranged by the LA/Governing Board.
- Board and lodging for a pupil on a residential visit (subject to statutory remissions - see Section 10).
- Extended day services offered to pupils (such as before- and after-school clubs, tea, and supervised homework sessions).

Cost Calculation of Optional Extras:

Charges for optional extras are determined based on actual costs including: materials/equipment provided, building/accommodation overheads, non-teaching staff, and teaching/supply staff contracted purely to provide the activity. The total charge must not exceed the actual cost divided equally by the number of participants, and cannot include any element of subsidy for other pupils. Parental agreement and willingness to meet the charges is a strict prerequisite before any optional extra is provided.

6.3 Music Tuition

The Charges for Music Tuition (England) Regulations 2007 allow schools to charge for vocal or instrumental tuition provided individually or to groups of any size, provided the tuition is requested directly by the parent/carer. Charges will not exceed the cost of the provision, including staff costs. No charges can be made if the teaching is an essential part of the National Curriculum, or if the pupil is in local authority care (Looked After Children under the Children Act 1989).

6.4 Residential Visits (Board and Lodging)

The school can charge for board and lodging on residential visits, but charges must not exceed the actual cost. When a residential visit forms part of the National Curriculum, no pupil will be excluded because their parent/carer cannot or refuses to pay. The school will consider if costs can be covered via the budget/fundraising, or seek an agreement. If funding is unviable, the trip may be cancelled. Welfare exemptions apply to board and lodging (see Section 10).

6.5 Education Partly During School Hours

Non-Residential: An activity is deemed to take place during school hours if 50% or more of the time (including travel) occurs during school hours. If less than 50% occurs during school hours, it is deemed outside school hours and may be charged as an optional extra if it is not curriculum-linked.

Residential: A residential visit is deemed to take place during school hours if the number of school sessions taken up by the visit is equal to or greater than 50% of the number of half days

spent on the visit. A 'half day' means any period of 12 hours ending with noon or midnight. Example: Pupils away from noon Wednesday to 9pm Sunday = 9 half days, including 5 school sessions. This is deemed to have taken place during school hours. Pupils away from noon Thursday to 9pm Sunday = 7 half days, including 3 school sessions. This is deemed to have taken place outside school hours.

7. ST. MARK'S TERMS & CONDITIONS FOR TRIPS & VISITS

St. Mark's Catholic School values the immense educational benefit of trips and visits. In order to manage school-led trips safely, equitably, and with financial transparency, the following terms apply to all planned educational trips and visits.

7.1 Costing of Trips and Visits

To protect the school's budget, the school must predict the full cost of a trip/visit accounting for external variables such as emergency contingencies, medical care, travel cost changes, and exchange rate fluctuations. The school always seeks the 'Best Value' option to minimise costs.

St. Mark's Surplus Refund Policy:

In cases where funds remain surplus after all invoices, travel costs, and expenses have been fully paid, the remainder will be credited back to the parent/carer if the surplus is over £5.00 per head. When the calculated surplus falls below £5.00 per head, the school will transfer these remaining monies to the St. Mark's School Fund, which is used for educational materials and resources that directly benefit all pupils. The School leaders and Governors reserve the right to allocate the School Fund as appropriate.

7.2 Surcharges

Travel operators and booking agencies frequently reserve the right to apply post-booking surcharges to cover fuel increases, airport taxes, or security fees. Although rare, St. Mark's reserves the right to pass these direct surcharges on to parents/carers in order to keep the trip financially viable and prevent cancellation.

7.3 Insurance

Students and staff participating in school-led trips are automatically covered by the school's standard liability and travel insurance. On residential trips, additional travel insurance is often bundled through the travel agency. Full policy details are available from the School Office. In the event that an insurance claim must be made, parents and carers are responsible for paying the excess that applies to the policy.

7.4 Cancellations and Withdrawals

If a trip is cancelled by the school, parents/carers will receive a full refund.

If a parent/carer chooses to withdraw a student from a trip after a booking has been confirmed, any refund is strictly discretionary and must be approved by the Governors' Trip Committee. The

parent/carer must write a formal request directly to the Chair of Governors - Trips. School staff members have no authority to process a refund without this written governor approval.

Any discretionary refund awarded will be subject to the deduction of non-refundable deposits and non-recoverable direct costs incurred by the school (for example, pre-purchased non-refundable tickets, transport slots, or hotel bookings). The school may also apply a standard administration fee to cover processing costs.

7.5 Oversubscribed Activities

When an activity or visit has limited places and is oversubscribed, the school will announce a clear application and deposit deadline. If applications exceed capacity after the deadline, places will be allocated using the following criteria in order of priority:

- Priority 1: Students who have not taken part, or have had less participation, in other school trips or extra-curricular activities during the current academic year.
- Priority 2: Random selection (ballot) of students whose applications and required deposit payments were received by the deadline.
- Priority 3: Remaining unsuccessful applicants will be placed in random order on a Reserve List.
- Priority 4: Students whose applications and payments were received by Student Services after the published deadline will be added to the Reserve List in chronological order.
- Priority 5: Students whose applications were received without any deposit payments attached will be placed last on the Reserve List.

7.6 Misbehaviour and Attendance Barring

At the sole discretion of the Headteacher, a student who has been accepted onto an extra-curricular activity or visit may be barred from attending if their behaviour in school in the period leading up to the trip is deemed unacceptable. This is a vital safeguard to ensure the safety of all students and staff on the visit. In the event of barring, any refund of deposits or contributions will be at the sole discretion of the Headteacher, taking into account any non-recoverable booking costs.

7.7 Parental Contact and Medical Data

It is the absolute responsibility of the parent/carer to ensure that the school holds current, accurate emergency contact numbers and up-to-date medical and dietary data for their child. This is critical for both overnight residential trips and day-only trips. The school reserves the right to withdraw a student from a trip if essential health or contact forms are not returned by the published deadlines.

8. VOLUNTARY CONTRIBUTIONS

As an exception to the strict non-charging rule for curriculum-linked activities, the school is legally permitted to ask parents and carers for voluntary contributions to fund activities (such as school trips, sports coaching, workshops, and educational visits) that would otherwise not be financially viable.

There is no obligation for any parent or carer to make a contribution. No child will be excluded from an activity or visit simply because their parent/carer is unwilling or unable to pay. All pupils will have an equal chance to participate in an activity or visit regardless of whether their parents/carers contribute.

If the school is unable to raise enough funds for an activity or visit through voluntary contributions, and alternative funding is unavailable, the activity will be cancelled. This fact will be clearly communicated to parents at the outset. When requesting voluntary contributions, the school strictly avoids sending pressurized reminders, color-coded letters, or direct debit mandates.

9. ACTIVITIES AND SERVICES WE CHARGE FOR

The school will charge for the following services, optional curriculum materials, and pupil-led damage:

9.1 Administrative and Identity Verification Services

Providing administrative services for personal, non-educational purposes falls outside our statutory educational duty. Therefore, the school charges an administrative fee to recover the cost of staff processing time, verifying pupil records, checking enrollment archives, and school stationery. These specific administrative charges are set out in the schedule below:

Administrative Service Type	Charge Amount	Processing Timescale
Confirmation of Roll Letter <i>(Confirming enrollment, attendance on headed paper)</i>	£5.00 per letter	5 to 10 working days
Any Other Custom Administrative Letter <i>(Letters for personal finance, visa support, housing, etc.)</i>	£10.00 per letter	5 to 10 working days

Important Request & Payment Guidelines:

- **How to Request:** Requests must be submitted in writing to the School Office via email or letter. You must provide the pupil's full name, registration group, and specific details required.
- **Payment Method:** All administrative charges must be paid in advance via ParentPay. The office staff will not begin the record verification or document production until payment has cleared.

- Remissions: St. Mark's is committed to supporting our community. The Headteacher reserves the right to waive or reduce these administrative charges for families facing severe financial hardship. Hardship requests will be handled on a sensitive, confidential, and case-by-case basis.

9.2 Practical Subjects - Requirements in Kind

Where ingredients, design materials, or craft equipment are required for practical curriculum subjects (such as Food Technology, Art, or Design Technology), parents and carers will be asked in advance for their agreement. If parents/carers wish to take physical ownership of the finished product, they are expected to supply the essential materials/ingredients, or may be charged for them by the school.

9.3 Breakages and Fines

As a result of a pupil's unacceptable or wilful behaviour, parents and carers may be charged the full replacement or repair cost of any wilful damage to school property (such as broken windows or fittings) or the loss or damage of textbooks, library materials, or iPads supplied by the school.

10. REMISSIONS AND WELFARE EXEMPTIONS

In certain circumstances, the school will waive or remit charges for items and activities. This section details our statutory and discretionary remissions.

10.1 Statutory Remissions for Residential Visits (Board and Lodging)

Parents and carers who can prove they are in receipt of any of the qualifying state benefits listed in the Appendix of this policy are strictly exempt from paying the cost of board and lodging on residential visits. The school is required by law to remit these fees.

10.2 Expanded Welfare Protections

In alignment with the August 2026 statutory model framework, the school has implemented several critical welfare protections to safeguard vulnerable pupils and maintain transparent financial fairness:

- Expanded Free School Meals (FSM) Eligibility: Children eligible for Free School Meals under the expanded FSM criteria in effect starting September 2026 are fully eligible to have the cost of board and lodging remitted on residential visits. This protection applies to any pupil currently known to the school to be eligible for FSM, without requiring additional benefit evidence.
- No Recourse to Public Funds (NRPF): Families with No Recourse to Public Funds (NRPF) who meet the maximum income thresholds to receive Free School Meals are fully exempt from board and lodging charges on residential visits. The school will assess NRPF FSM eligibility with sensitivity and absolute confidentiality.

- **Newly Eligible FSM Refund Guarantee:** If a pupil becomes newly eligible for FSM after their parent or carer has already paid for board and lodging on an upcoming residential visit, the school will issue a full refund of the board and lodging fees. The only prerequisite is that the pupil's FSM entitlement must formally take effect before the residential visit takes place.

10.3 Discretionary Remissions

The Governing Board commits to supporting all pupils' access to extracurricular opportunities. At the discretion of the Governing Board, or delegated to the Headteacher, the school may remit (wholly or partly) any other non-statutory charges. Discretionary decisions are based on the individual activity, the benefit to the pupil, and the availability of alternative school funds. Applications for discretionary remission should be made in confidence directly to the Headteacher or School Business Manager.

11. MONITORING AND REVIEW ARRANGEMENTS

To ensure that St. Mark's Charging and Remissions Policy remains fully compliant with DfE guidelines and reflects the latest welfare legislation, the monitoring arrangements are structured as follows:

11.1 Annual Review Cycle

While St. Mark's previous policy operated on a two-year review cycle, the Governing Board has adopted the Department for Education (DfE) recommendation to review this policy annually. This annual review cycle ensures rapid integration of any changes in state benefits, free school meal eligibility criteria, or local authority charging regulations.

11.2 Responsibility and Approval

The School Business Manager has delegated responsibility to monitor charges and remissions on a day-to-day basis, ensuring that all fees and financial exclusions comply entirely with this policy.

During each annual review, the updated policy must be formally approved by the Governing Board's Finance Committee and signed off by the Chair of Governors and the Headteacher.

Policy Integrity Statement:

This policy stands as the definitive framework for all financial charging and support structures at St. Mark's Catholic School. It has been reconciled and merged with the most current national model published in August 2026. This policy supersedes all prior editions.

APPENDIX: QUALIFYING BENEFITS FOR REMISSION

Parents and carers who can prove they are in receipt of any of the following state benefits are legally exempt from paying the cost of board and lodging for residential visits. These benefits represent the statutory threshold for remissions:

- Income Support
- Income-based Jobseeker's Allowance (JSA)
- Income-related Employment and Support Allowance (ESA)
- Support under Part VI of the Immigration and Asylum Act 1999
- The guaranteed element of Pension Credit
- Child Tax Credit (provided you're not also entitled to Working Tax Credit and have an annual gross income of no more than £19,995 as of June 2025)
- Working Tax Credit run-on (paid for 4 weeks after you stop qualifying for Working Tax Credit)
- Universal Credit (under eligibility and government guidelines)
- Free School Meals (FSM) Eligibility: Any child eligible for Free School Meals, including under the expanded criteria taking effect in September 2026, is exempt.
- No Recourse to Public Funds (NRPF): Households with No Recourse to Public Funds who meet the FSM maximum income thresholds are exempt.

Important Support Information for Parents:

If you are in receipt of any of these benefits, please contact the School Office in advance of booking any trip. The school requires standard written proof of eligibility (for example, a benefit award letter or Universal Credit statement). All records are held with strict confidentiality in line with GDPR. If your circumstances are not listed but you are facing severe financial difficulty, please reach out to the School Business Manager.