





# Lumen Learning Trust

Learning together for a brighter future

## Charging & Remissions Policy

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<b>SIGNED EXECUTIVE PRINCIPAL</b>	Mary Ellen McCarthy 	<b>DATE</b>	03/03/2026
<b>SIGNED CHAIR OF DIRECTORS</b>	Jo Roberts 	<b>DATE</b>	03/03/2026

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Lumen Learning Trust puts the children's needs at the heart of its provision. Our whole school community is committed to enabling the children to become successful lifelong learners and happy, fulfilled adults who can make positive choices about their future.

### 1. Directors' Statement

The Lumen Learning Trust values each pupil as an individual and enables them to achieve their full potential through a wide variety of opportunities and experiences. The directors wish to ensure that all pupils have access to all areas of the life of the school, regardless of parents' ability to pay.

Some activities organised by the school during school hours may require payment. Parents are asked to make voluntary contributions to cover the cost of these activities. No child is excluded from taking part in these activities because of non-payment of the contribution. However, if insufficient contributions are received, and the school cannot make up the shortfall through alternative methods, e.g. school funds and / or fund-raising, an activity may need to be cancelled.

The senior leadership team and directors will consider sympathetically cases of genuine financial need and remit charges, where appropriate.

The Lumen Learning Trust is required through its funding agreement to comply with the law on charging for school activities. The directors have adopted a policy in line with the charging and remissions guidance provided by the Department of Education.

### 2. Aim of Policy

The aim of this policy is to enable the schools within the trust to make charges and remissions to parents and to meet our statutory duty. Schools are only permitted to make charges if they have a Charging & Remissions Policy.

### 3. Scope of Policy

The policy details each type of activity that can be charged for and explains how and when these charges will be made. In addition, the policy covers the circumstances in which the schools within the trust will remit charges, wholly or partly, for any activities for which there would normally be a charge.

The items that schools **can** charge for are:

- Any materials, books, instruments, or equipment, where the child's parent wishes him/her to own them
- Music and vocal tuition

- Activities which take place wholly or mainly outside school hours, but which are not provided as part of the syllabus for a prescribed public examination and which are not required in order to fulfil statutory duties relating to the national curriculum or to religious education.
- Certain early years provision
- Community facilities
- Optional extras

#### **4. 'Optional extra' Activities**

Charges can be made for some activities known as 'optional extras' including the cost for providing materials, books, instruments or equipment. Optional Extras are defined as:

- Transport (other than transport that is required to take the pupil to school or to other premises where the local authority/governing body have arranged for the pupil to be provided with education)
- Board and lodging for a pupil on a residential visit but not exceeding the actual cost
- Extended day services offered to pupils (for example breakfast club, after-school clubs, tea and supervised homework sessions)

Participation in any optional extra activity will be on the basis of parental choice and a willingness to meet the charges. Parental agreement is therefore a necessary prerequisite for the provision of an optional extra where charges will be made.

Any charges made should not exceed the actual cost of the optional extra equally divided by the number of pupils participating. The cost should not subsidise the cost of pupils whose parents are unwilling or unable to pay the full charge.

#### **5. School Transport**

The school **cannot** 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 that enables a pupil to meet an examination requirement when he or she has been prepared for that examination at the school.
- Transport provided in connection with an educational visit (linked to curriculum, rather than for optional extras as detailed in section 4).

However, if a pupil makes use of transport not provided by the LA or school to travel direct from home to an activity sanctioned, though not provided by the LA or the school, then parents may be asked to meet the cost of such travel.

#### **6. Non-residential Trips /Activities**

- a) Trips / activities which take place wholly or mainly \* within school hours, and those which take place outside school hours, as long as the latter are part of the curriculum syllabus for an examination or statutory religious education.

The school governing body are able to ask for voluntary contributions for the benefit of the school or any of these

school trips / activities, however:

- We will make it clear at the outset if a trip / activity cannot be funded without voluntary contributions and may be cancelled if there is insufficient support.
- We will make it clear to parents when the contribution is voluntary.
- Children will not be treated differently if the parents are unable or unwilling to pay. All children will be given an equal chance to take part.
- We will make the school's policy for allocating places clear to parents at the outset.

The school will not send colour coded messages as reminders for payments for activities into the school or other funds. Direct debit or standing order mandates will not be sent when requesting voluntary contributions.

Once a voluntary contribution has been made towards a trip / activity it is not normally possible to return that contribution once it has been received. Examples include, but are not limited to:

- a pupil is ill on the day of a trip;
- a non-returnable deposit has already been paid over to a provider and the pupil no longer wishes to go on the trip.

b) Trips / activities which take place wholly or mainly \* outside school hours and are not part of the curriculum syllabus for an examination or statutory religious education

Charging for these will be compulsory. The cost of providing the activity will be divided between the number of pupils taking part but must not include an element of subsidy for any other pupils wishing to take part whose parents are unwilling or unable to pay.

*\* If 50% or more of time spent on the activity occurs during school hours, it is deemed to take place during school hours. Time spent on travel counts in this calculation if the travel itself occurs during school hours. School hours do not include the break in the middle of the day.*

*Where less than 50% of the time spent on an activity falls during school hours, it is deemed to have taken place outside of school hours.*

## **7. Residential Visits**

a) Trips / activities which take place wholly or mainly \* within school hours, and those which take place outside school hours, as long as the latter are part of the curriculum syllabus for an examination or statutory religious education.

By law, the school can charge for:

- Board and lodging and the charge must not exceed the actual cost.
- Parents who are in receipt of the benefits listed in Appendix 1 will be exempt from paying the cost of board & lodging.

By law the school cannot charge for:

- Education or the cost of travel provided on any visit that takes place during school hours.
- Education or the cost of travel on any visit 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 pupil is being prepared for by the school or part of religious education.
- Supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential visit.

The school governing body are able to ask for voluntary contributions for the benefit of the school or any of the non board and lodging costs for these residential visits, however:

- We will make it clear at the outset if a trip / activity cannot be funded without voluntary contributions and may

be cancelled if there is insufficient support.

- We will make it clear to parents when the contribution is voluntary.
- Children will not be treated differently if the parents are unable or unwilling to pay. All children must be given an equal chance to take part.
- We will make the school's policy for allocating places clear to parents at the outset.

The school will not send colour coded messages as reminders for payments for activities into the school or other funds. Direct debit or standing order mandates will not be sent when requesting voluntary contributions.

Once a voluntary contribution has been made towards a residential visit it is not normally possible to return that contribution once it has been received. Examples include, but are not limited to:

- a pupil is ill on the day(s) of the residential visit;
  - a non-returnable deposit has already been paid over to a provider and the pupil no longer wishes to go on the residential visit.
- b) For residential visits which take place wholly or mainly outside school hours and are not part of the curriculum syllabus for an examination or statutory religious education

Charging for these will be compulsory. The cost of providing the activity can be divided between the number of pupils taking part but must not include an element of subsidy for any other pupils wishing to take part whose parents are unwilling or unable to pay.

*\* 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 a visit, it is deemed to have taken place during school hours (even if some activities take place late in the evening).*

*Regardless of start and finish times, a school day is divided into 2 sessions. A 'half day' means any period of 12 hours ending with noon or midnight (see appendix 2 for examples).*

## **8. Breakages**

The Lumen Learning Trust will request parents to pay for damage caused as a result of a pupil's behaviour. Examples include, but are not limited to: replacing a broken window; replacing a defaced, damaged or lost textbook; and making good any acts of vandalism.

## **9. Remission of charges**

Schools within the Lumen Learning Trust will inform parents on low incomes and in receipt of the relevant benefits that they may be entitled to partial remission of some of the charges detailed within this policy, determined on a discretionary basis and by trip. The relevant benefits are aligned with the Free School Meals (FSMs) criteria as detailed in Appendix 1.

The trust will make best efforts to cover for any potential shortfall in contributions to school activities or visits from the deprivation funding within the school's budget share, and within Pupil Premium funds. In addition, non-trip voluntary donations or unrestricted funds may be used to help with the cost.

## **Appendix 1**

Parents who are in receipt of the benefits listed in below will be exempt from paying the cost of board & lodging.

Additionally, schools within the Lumen Learning Trust will inform parents on low incomes and in receipt of the relevant benefits that they may be entitled to full or partial remission of charges when parents are asked for contributions towards the cost of school visits. The relevant benefits are aligned with the Free School Meals (FSMs) criteria as detailed below:

- Universal credit.
- Support under part VI of the Immigration and Asylum Act 1999.

## **Appendix 2**

### *Examples of residential visit school time calculations*

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 a visit, it is deemed to have taken place during school hours (even if some activities take place late in the evening)

Regardless of start and finish times, a school day is divided into 2 sessions.

A 'half day' means any period of 12 hours ending with noon or midnight.

#### **Example 1:**

Pupils are away from noon on Wednesday to 9pm on Sunday.

This counts as 9 x 'half days' and includes 5 school session, so the visit is deemed to have taken place during school hours.

#### **Example 2:**

Pupils are away from noon on Thursday to 9pm on Sunday.

This counts as 7 x 'half days' and includes 3 school session, so the visit is deemed to have taken place outside of school hours.