UPSHIRE PRIMARY FOUNDATION SCHOOL

CHARGING, REFUNDS AND REMISSIONS POLICY

Mission Statement

At Upshire Primary Foundation School, we aim to provide opportunities for the children to achieve their full potential academically, creatively, socially, physically and emotionally in a happy, supportive, caring and inspiring environment.

School Vision

*INSPIRE*EXCITE*ACHIEVE*

Imagine an inspiring and exciting environment where learning happens because children want to achieve!

Introduction

The Governing Board has resolved to make charges as allowed by sections 449-462 of the Education Act 1996

CHARGING POLICY

The school aims to have a clear, robust process in place for charging, refunds, and remissions; this policy clearly sets out the activities that are chargeable, when charges will and will not be made, the management of refunds and the process for claiming remission.

The Governing Board has overall responsibility for approving and monitoring the implementation of this policy but can delegate to a sub-committee according to their terms of reference and the school's financial regulations.

The Headteacher is responsible for ensuring all staff are familiar with the content of this policy and that it is being applied consistently.

Staff are responsible for implementing this policy and notifying the Headteacher of any specific circumstances where they are unsure of that implementation.

Definitions

Charge: the fee payable for a specifically defined activity
Refund: the return of monies previously paid for a specifically defined activity
Remission: the cancellation of / exemption from a charge that would normally be payable

School meals

The charge for a school meal will be set annually by the Governing Board following consideration of the Catering Business Plan as part of the annual budget setting process.

All meals taken by pupils who are not eligible for free school meals will be chargeable, parents/carers are expected to pay at the point of booking via Citrus.

Should a parent/carer not book a meal or send their child in without a packed lunch, a standard lunch will be given to that child. A charge for the lunch will be levied against that child's dinner account and parents/carers will be expected to clear the debt promptly.

There is no charge for pupils who are entitled to free school meals or universal infant free school meals.

Educational visits

The school:

- will seek voluntary contributions from parents/carers where applicable
- will not exclude a child from participating in an activity during the school day on financial grounds

Where 10% or more of parents decline to make the requested voluntary contribution (their identity will remain confidential), or the contributions shortfall is £50 or more, then the visit or activity will not take place.

Residential activities

The costs of residential activities can be high and such activities may only continue to be available if sufficient costs are recovered.

Charges that apply:

- travel costs – transport to and from the residential activity
- board and lodging
    - full cost of board and lodging on residential trips whether or not it takes place during school hours
    - parents / carers will be informed of the cost before the activity takes place

- costs of supply staff engaged to cover the staff accompanying pupils on a residential trip where the trip takes place during term time
- full cost recovery for residential activities that take place outside of school hours

No charge applies:

- where parents/carers in receipt of certain benefits may claim exemption in accordance with the Remissions guidance below
- for education costs incurred on any visit during school hours
- for education costs incurred on any visit outside school hours if it is part of the school's curriculum

NB: If requested, the school will help with the cost of residential trips for children of families claiming free school meals.

Music tuition

Instrumental tuition or singing lessons do not form part of the curriculum but are an additional activity arranged by the school and delivered by specialist tutors either on an individual basis or as part of a group, following parental request. The cost of such lessons is dependent on the charges applied by the tutors, the size of the group, the duration and frequency of each lesson.

The school operates on full cost recovery basis. However, in order to ensure equal opportunities for all pupils, charges for music tuition within school hours for pupils eligible for free school meals or children in care will be considered for remission in accordance with this policy (see remissions section).

There will be no charge applied if the music tuition forms part of a public examination syllabus being followed by a pupil of the school.

Examination fees

No charge when:

- an exam is part of the curriculum
- an exam is on the school's set examinations list
- the pupil has been prepared for that exam by the school
- the exam is not on the set list, but has been arranged by the school

Charges do apply when:

- the pupil has not been prepared for the exam by the school
- the pupil wishes to re-sit an exam
- the pupil fails to reach the required standard without good reason (the school may ask the parents to pay the original exam fee)

Extra-curricular activities

Curriculum related clubs

The school will endeavour to offer the children a range of optional activities to widen their experiences eg. football, gymnastics etc. These activities will run outside the normal school hours and parents/carers will be asked for payment where outside contractors are employed to run these clubs. Parents/carers are expected to pay for these clubs in advance and non-payment may result in action being taken to recover any debt.

Parents/carers will be advised of any such costs before their child is allowed to undertake any such activity and participation will be on the basis of the parents'/carers' willingness to pay the charges.

Please refer to the Payments and Debt Collection Policy.

Parents/carers are able to seek remission from such charges if their child is in receipt of the Pupil Premium Grant. Guidance is available on page 5.

Breakfast club

- charges apply in accordance with the rules laid down in the school's separate Breakfast Club agreement, which must be signed by parents/carers before their child is left in the care of breakfast club staff

Afterschool club

- charges apply in accordance with the rules laid down in the school's separate Afterschool Club agreement which must be signed by parents/carers before their child is left in the care of afterschool club staff

Other areas:

Charges apply:

- books and materials belonging to the school that a pupil has lost
- books and materials that a parent wishes a pupil to keep after having been advised of the cost
- activities taking place outside school hours that are not
    - part of the school's curriculum
    - part of a syllabus for a public examination that the pupil is being prepared for by the school
    - part of the school's basic religious education
- property damage – each individual case to be decided upon by the Headteacher
    - full repair costs incurred as a result of wilful or reckless damage to school property by a pupil or parent/carer
    - full recovery of costs incurred by the school as a result of damage caused by a pupil to third party property

No charge applies

- for activities taking place during school hours except any of those listed above
- for transport during school hours for school-organised activities except for educational visits as detailed above
- for activities outside school hours that are part of the
    - set curriculum including sports matches against other schools/academies
    - syllabus for a public examination that the pupil is being prepared for by the school
    - school's basic religious education syllabus
- for admissions

Voluntary contributions

The school may, from time to time, ask parents/carers for voluntary contributions to the school's general funds in order to assist with the provision of resources to enhance their children's education. There will be no pressure exerted and any contribution will be gratefully received.

Where the voluntary contribution applies to an educational visit or extra-curricular activity, if the sufficient level of contributions is not achieved, that activity will be cancelled; any monies already collected will be refunded to the relevant parents/carers.

DBS checks

The school will cover the cost of DBS checks for all employed staff.
The school may cover the cost of DBS checks for volunteers and these will be considered on a case-by-case basis.

Charging in kind

The cost of ingredients, materials, equipment etc. needed for practical subjects such as food technology or DT is budgeted for and borne by the school. However, the school may charge for or require the supply of ingredients and materials if the product is to be owned and taken home by the child afterwards e.g. food products, models containing electrical equipment or batteries. The school will inform parents prior to activities, giving them the choice to pay for materials or purchase their own materials for the activity.

Miscellaneous charges

The Headteacher, Resources Committee or the Governing Board may levy charges for miscellaneous services as follows:

- photocopying – 10p per sheet
- signing passport or driving licence forms - £15.00
- completing applications for school admissions - £15.00

Methods of payment

Payments should be made via the school's online payment system – Parentmail.

Special educational need or disabilities

The Governing Board confirms that no pupil with special needs or disabilities will be treated any differently than any other pupil. The school will take all reasonable steps to avoid putting children with special needs at a substantial disadvantage.

Lettings

Lettings must be booked via school office and paid for in advance. Please refer to the Lettings Policy.

REFUNDS POLICY

School meals

- Where a school meal is booked and paid for in advance and the pupil is absent due to illness, the funds will be retained to be used for future meals only if the parent accesses the Citrus system and marks their child as absent before 8.00am on the day.
- If the school has to cancel meal provision for a short time, the income received in advance will be recorded against each individual pupil to be used to cover future meals; where that amount exceeds £30 for any one pupil, the parent/carer may request a refund.
- When a pupil leaves the school and income has been received but meals not taken, the parent is entitled to request a refund where the figure exceeds £10.

Educational visits

- When a pupil is absent due to illness and does not attend an educational visit, the transport/entrance cost will not be refunded, where already committed. However, where possible, the school will endeavour to recover costs related to that activity and, if successful, will then refund the parent/carer.
- If a trip has to be cancelled by the school, parental contributions will be refunded.
- Where contributions for an activity exceed the final total cost by more than £5 per pupil, a refund will be given. Excess income less than £5 per pupil will be retained in school funds. Excess expenditure will be paid from school funds.

Residential activities

- If a pupil does not attend a residential activity due to illness, the school will endeavour to recover costs, through the trip insurance and, if successful, will then pass this refund onto the parent/carer; please note that initial deposits may be retained by the travel company.
- Where a residential trip is cancelled by the travel company, the school will endeavour to recover full refunds which, upon receipt, will be passed onto the parents/carers.
- Where a residential trip is cancelled by the school, parental contributions already received will be refunded, less any initial deposits withheld by the venue.

Music tuition

- Where Instrumental or singing lessons are cancelled by the tutor or the school, and payment has already been received, the school will transfer the funds to cover future lessons taken by the relevant pupil. If lessons are not being continued in the following term, the parent/carer may request a refund.
- Where a pupil fails to attend a pre-booked lesson, refunds do not apply.

Extra-curricular activities – not part of the curriculum

- If it becomes necessary for the school or an outside provider to cancel any sessions, you will receive a refund or have that session credited to the following term. No other refunds will be given.

Breakfast and afterschool clubs

Refunds are in accordance with the rules laid down in the separate Breakfast/Afterschool Club Terms & Conditions.

Lettings

Refunds are in accordance with the school's Lettings Policy.

REMISSIONS POLICY

The Headteacher and Chair of Governors will authorise the remission of charges in all cases.

The school will consider the remission of charges to parents or carers who receive the relevant support payments (in accordance with the current DfE listing) which make their child/children eligible for free school meals and for children in care.

All claims for remission of charges should be addressed to the Headteacher and will be dealt with confidentially.

The school may decide to subsidise part or all of the payment of some charges for certain activities and pupils; each event or case will be considered individually by the Headteacher and the Governing Board.

Monitoring and review

There will be an annual review of this policy by the Resources Committee.

Confirmation that the Charging, Refunds and Remissions Policy in respect of Upshire Primary Foundation School was discussed and adopted by the Resources Committee on 2nd February 2026