ST JOSEPH'S CATHOLIC PRIMARY SCHOOL

DIOCESE OF LANCASTER

Charging and Remissions Policy

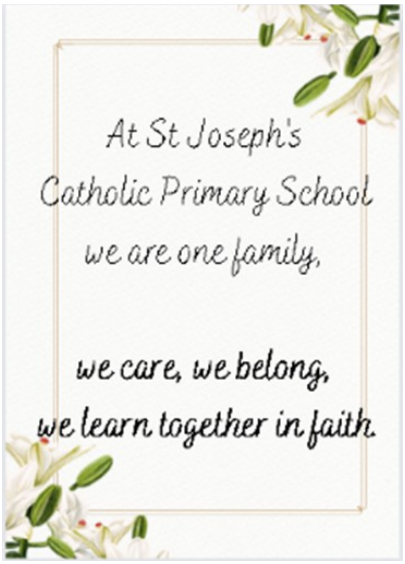
2026–2027

We care, we belong, we learn together in faith.

Approved by (Head Teacher)	Annette Savage (approval delegated by the Governing Body)
Version	5 – October 2026
Proposed review date	October 2027
Based on	KAHSC model v12 (September 2025)

Our Vision & Mission

The heart of St Joseph's Catholic Primary School – shared at the start of every school policy



OUR VISION

In the faithful care of St Joseph, Jesus prospered.
We care, we belong, we learn together in faith.

OUR MISSION

St Joseph's is a Catholic primary; we are one family. We care, we belong, we learn together in faith.

As a school family we:

- promote the partnership of home, school, church and community;
- pray together, grow in faith and live the Gospel values;
- respect and care for everyone and everything around us;
- value each child as an individual;
- encourage our pupils to develop active and creative minds;
- promote self-esteem and confidence;
- set high standards of learning;
- celebrate the achievements of each and every child.

> *St Joseph's is a Catholic School, in which each individual is valued, cherished and nurtured, as they grow in the knowledge and love of Christ.*

Our vision and values are at the core of everything we do. Our values are rooted in the Gospel and underpin our relationships, teaching and learning, preparing our pupils as confident, happy citizens. In partnership with parents and the community, our purpose is to provide a high standard of education, recognising each person's talents and enabling them to fulfil their true potential.

Our Gospel Values are understood and respected by adults and children alike, as we learn and play alongside one another, showing love, care and forgiveness in all we do. At St Joseph's we focus on the following Gospel Values:

Autumn Term	Spring Term	Summer Term
Honesty & Forgiveness The Prodigal Son *Luke 15:11–32*	**Respect & Resilience** The Three Wise Men *Matthew 1:1–12*	**Community** Sharing a Meal *Acts 2:46–47*
Thankfulness & Perseverance The Birth of Christ *Luke 2:9–10*	**Generous & Proud** The Good Samaritan *Luke 10:25–37*	**Eloquent & Truthful** Pentecost – The power of the Holy Spirit *Acts 2:1–31*
	Trust Parting of the Red Sea *Exodus 14:21–22*	

Our Mission Statement was written involving all stakeholders in our school – children, parents, staff and governors. It is clearly understood by all, underpinning all we do in school and determining our whole purpose and ethos. We firmly believe that wherever you are in our school you will see our mission statement being lived – in class, in the playground and in our interactions and love of each other.

Document Control

Approved by	Name	Signed	Date
Head Teacher	Annette Savage		

Version	Description	Date
1	Original, based on KAHSC v7.	September 2020
2	Based on KAHSC v9: updated to include school meals.	September 2023
3	Based on KAHSC v10.	September 2024
4	No legal changes. Small link changes.	September 2025
5	Based on KAHSC v12: reference to the 2025 statutory guidance on early years charging; 'cared for' wording; non-residential activities clarified; worked examples of residential visits added. St Joseph's settings carried forward from version 4 (school hours, contacts, school meals price, notice period, school meals debt procedure, milk scheme, wraparound care, residential payment plans, monitoring). Academy, boarding, cashless catering and nursery free-entitlement sections removed as they do not apply. New front cover, Vision & Mission page and house style.	October 2026

Proposed review date: October 2027. The Head Teacher is free to approve this Policy and decide its review period; the Governing Body has delegated approval to the Head Teacher.

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1. Policy scope

Sections 449 to 462 of the Education Act 1996 (legislation.gov.uk) and The Education (School Sessions and Charges and Remissions Policies) (Information) (England) Regulations 1999 (legislation.gov.uk) set out the law on charging and remissions for school activities in England and require schools to have a Policy on charging.

The Education (Charges for Early Years Provision) Regulations 2012 (legislation.gov.uk) sets out when charges can be made for some early years provision and Further updates from the DfE regarding the revised charging guidance LA FAQs explains the 2025 changes in statutory guidance about these charges as a result of the implementation of Early education and childcare - GOV.UK duties on Local Authorities.

This Policy is based on the law, statutory guidance if relevant, and the non-statutory Department for Education (DfE) guidance Charging for school activities - GOV.UK.

Section 21 of the Education Act 2002 (legislation.gov.uk) gives schools the power to provide community facilities or services for the (charitable) benefit of pupils or their families, or people who live or work locally. This Policy does not apply to charges we make for community facilities which are handled separately under hire agreements.

This Policy does not apply to charges made and determined by other organisations offering activities and services on the school premises e.g., a community club that hires our hall to meet in and charges its members to attend.

1.1 Aims

This Policy aims to ensure that:

- All pupils have full and free access to a broad and balanced curriculum regardless of their family's financial means.
- This school is transparent about the activities or items that can be charged for and when charges will be made, or remissions offered.
- We recognise our responsibility not to place undue pressure on family finances for example, by giving good notice about charges and by not offering activities on a 'first to pay, first served' basis.

1.2 Definitions

Charge: a fee payable for clearly defined items or activities.

Half-day school session: any period of 12 hours ending at noon or midnight (p9, DfE, 'Charging for school activities', 2018).

Remission: the cancellation of a charge which would normally be payable.

School hours: the hours when school is in session and which do not include the lunch break: each weekday 8:45am–12:00pm and 12:45pm–3:15pm.

1.3 Associated policies and procedures

The following policies and procedures may impact the implementation of this Policy:

- Educational Visits procedures
- Equality Policy
- Hire of school facilities procedures

2. Roles and responsibilities

2.1 The Governing Body

The Governing Body has overall responsibility for approving the Charging and Remissions Policy and delegates this to Annette Savage (Head Teacher).

The Governing Body also has overall responsibility for monitoring the implementation of this Policy.

2.2 The Head Teacher

The Head Teacher is responsible for ensuring staff are familiar with the Charging and Remissions Policy and that it is being applied consistently.

2.3 Staff

The Charging and Remissions Policy and how to implement it is included in the induction of new staff and the senior leadership team will provide updates or refresh training as necessary.

Our staff are responsible for:

- Implementing the Policy consistently.
- Notifying the Head Teacher of any specific circumstances which they are unsure about or where they are not certain if the Policy applies.

2.4 Parents and carers

Parents and carers are expected to notify staff or the Head Teacher of any concerns or queries regarding the Charging and Remissions Policy.

3. When no charges will be made

3.1 Education

There will be no charge for:

- Admission or applications for admission
- Education provided wholly or mostly 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
  - A syllabus for a prescribed public examination that the pupil is being prepared for at this school
  - Religious education
- Instrumental or vocal tuition, for pupils learning individually or in groups, if the tuition is required as part of the National Curriculum, a syllabus for a prescribed public examination that the pupil is being prepared for at this school, or religious education. This includes the first access to the Key Stage 2 Instrumental and Vocal Tuition Programme (Wider Opportunities).
- Entry for a prescribed public examination if the pupil has been prepared for it at this school
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at this school

3.2 Transport

There will be no 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 this school
- Transport provided in connection with an educational visit

3.3 Educational visits

There will be no charge for:

- 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
  - A syllabus for a prescribed public examination that the pupil is being prepared for at this school
  - Religious education
- Supply staff to cover for those staff who are absent from school accompanying pupils on a residential visit.

4. Voluntary contributions

When charges do not apply, parents and carers may be asked for a voluntary contribution towards the cost of some of the educational opportunities that we offer such as:

- On site enrichment activities, educational visits and the associated transportation and other costs
- Specialist equipment
- General school funds to improve opportunities.

From time to time, we may invite outside organisations such as The Life Bus or theatre groups to deliver an activity during the school day. Such organisations may wish to charge parents, who are entitled not to pay any fee and instead to ask the Head Teacher to agree to their child being absent/taught elsewhere in school for that period. In many cases, however, parents and carers will not be charged and will be asked for a voluntary contribution towards the cost of the activity instead.

All requests to parents and carers for voluntary contributions will make it clear that the contributions are voluntary and that there is no obligation to pay. Pupils whose parents or carers do not contribute will not be treated differently or excluded.

However, the Governing Body reserves the right, to cancel activities if not enough voluntary contributions are received.

5. When charges will be made

This school may recover the full costs of some items and activities, but charges will not exceed the actual cost for:

- Any materials, books, instruments, or equipment, where a pupil's parents or carers have indicated in advance that they would like their child to own the items or finished products. No pupil will be disadvantaged if they do not or cannot take up the opportunity to own items or finished products.
- Non-attendance "without good reason" of any public examination that incurs a fee.
- Optional extras
- Music and vocal tuition, in limited circumstances.
- School meals

- School milk scheme
- Before and/or after school care
- Community facilities (dealt with separately from this Policy in hire agreements).

Reasons for and the procedures for handling these charges are described in more detail below.

Any annual charges associated with services or equipment hire schemes, including additional charges for out of warranty repairs or similar expenses are explained in each contract or hire agreement. For more information about contracts and agreements, contact Mrs Kiri Skelton in the school office or email admin@st-josephsrc.cumbria.sch.uk.

5.1 Optional extras

There are charges for:

- Education that takes place outside school hours if it is **not** part of:
  - The National Curriculum
  - A syllabus for a prescribed public examination that the pupil is being prepared for at this school
  - Religious education
- Examination entry fee(s), including for re-sits if the pupil has not been prepared for the examination(s) or re-sit at this school.
- Transport (other than transport that is required to take pupils to school or to other premises where the local authority/governing body have arranged for pupils to be provided with education).
- Board and lodging for a pupil on a residential visit (unless remission is granted)
- Extended day services offered to pupils (for example breakfast club, lunchtime and after-school clubs, tea and supervised homework sessions where this is run under the responsibility of the governing body).

In calculating the cost of optional extras an amount may be included for:

- Any materials, books, instruments, or equipment provided in connection with the optional extra.
- The cost of buildings and accommodation
- Non-teaching staff.
- Teaching staff engaged under contracts for services purely to provide an optional extra, this includes supply teachers engaged specifically to provide the optional extra.
- The cost, or an appropriate proportion of the costs, for teaching staff employed to provide tuition in playing a musical instrument, or vocal tuition, where the tuition is an optional extra.

Any charge made in respect of individual pupils will not exceed the actual cost of providing the optional extra activity, divided equally by the number of pupils participating. Families on a low income who are unable to pay such charges should speak to Miss Savage (Head Teacher) about remission, in complete confidence.

5.2 Music tuition

A charge will be made for vocal and musical instrument tuition for either an individual pupil or groups of any appropriate size when it is provided at the request of the pupil's parent.

National charging guidance will be followed, and no charge will be made in respect of a pupil who is 'cared for' by a local authority (within the meaning of section 22(l) of the Children Act 1989).

5.3 School meals

School meals are available to pupils at a cost of £2.83 per day or free of charge to the pupils of families entitled to free school meals.

Families can find out how to Apply for free school meals - GOV.UK (www.gov.uk) or they can apply directly to their home Local Authority, Cumberland Council, at Citizen Portal - Sign in (cumberland.gov.uk). Families needing help to do this can ask at the school office.

To enable our school meals service to be planned efficiently, we need advance notice of a pupil's requirements and ask for 1 week's notice to start or stop receiving a school meal.

Payment for school meals is required in advance.

If a pupil's entitlement to free school meals has expired, a parent or carer must provide a packed lunch or make advance payment for any school meals to be taken.

If a pupil arrives at school without payment or a packed lunch, we will use their emergency contact information to find out if suitable meal arrangements have been made. School is not obliged to provide a meal without payment or when there is no entitlement to a free school meal.

School is not obliged to provide a meal without payment when there is no entitlement to a free school meal, so we will act promptly to address financial issues at an early stage, to prevent arrears accumulating.

If no arrangements are in place, we will ask parents or carers to bring to school a suitable packed lunch or the cost of a school meal before lunchtime. In special circumstances we might accept payment on the next school day.

Where our efforts to resolve payment problems within the same school week fail, or where a persistent debt has arisen, the following procedure applies.

- If a parent or carer builds up a school meals debt of 1 week or less (up to £14.15), we will contact them with the amount owed and ask for immediate payment.
- If payment is not received and the debt increases to between 1 and 2 weeks (up to £28.30), a letter will be sent home explaining the consequences of non-payment and the final date by which payment must be made.
- If the matter remains unresolved, a third and final letter will be sent requesting payment and explaining the school's next steps, which could include debt recovery action.

The school budget cannot carry a school meals debt of more than one week's payment. If debts are run up, the school budget has to pay for them, which means money that should be spent on children's education is used instead. If a parent or carer repeatedly fails to provide a packed lunch, or enough money to cover the cost of school meals, we may need to make a referral through the Cumberland Safeguarding Children Partnership procedures, in case this is a sign that a pupil is experiencing a significant underlying wellbeing or safeguarding issue.

We are committed to working together to find suitable payment plans for parents and carers in financial difficulties, and anyone experiencing this should speak to the Head Teacher in the strictest confidence. We may be able to signpost families to extra government or community support in the immediate or short term.

Where no attempt is made to clear a school meals debt, we will take appropriate debt recovery action in accordance with our normal financial procedures (see section 7 for more information).

5.4 School milk scheme

Under The Requirements for School Food Regulations 2014 (legislation.gov.uk) all schools must make lower fat milk or lactose reduced milk available to drink at least **once** a day during school hours or the lunch break at a fair cost or free of charge to all pupils who are entitled.

Up to one third of a pint of milk is available to all children free of charge, regardless of their family circumstances up to the age of 5.

When a child has their 5th birthday, a small charge will be made towards the cost of continuing to provide this single portion of milk to those parents and carers who want their children to continue receiving it.

Children who have reached the age of 5 and have not yet reached the age of 19 can continue to receive up to one third of a pint of milk free of charge if their family has been able to successfully apply for free school meals - GOV.UK (www.gov.uk).

In the case of infant pupils who are entitled to a universal infant free school meal, milk must be offered free to those pupils **if** it forms part of the school lunch. If milk is offered at any other time during the school day instead, it will only be free for those infants who have an underlying income-related entitlement to free school meals.

A parent or carer who wishes their child to receive more than one portion of milk per day must pay the full cost of each additional portion, even when their first portion is free due to an entitlement.

For more information about our milk scheme and the current charges, please ask at the school office.

5.5 Before and/or after school care

Charges will be made for childcare services offered to pupils before school, after school and during school holidays when they are run by this school.

The fees and any remissions are set and reviewed by the Governing Body no less than annually. For information about current childcare charges please contact Mrs Kiri Skelton or email admin@st-josephsrc.cumbria.sch.uk.

5.6 Damage to property and breakages

The school will attempt to recover some, or all the costs incurred repairing wilful or culpably negligent damage or breakage of school property or property belonging to a third party where the school has been charged. The actual amount will be determined by the Head Teacher.

6. Calculating charges and remission

The principles of best value will be applied when planning activities that incur costs to school and/or charges to parents and carers.

When charges are made for activities, they will be based on the actual costs incurred, divided by the total number of pupils participating. There will be no levy on those who can pay to support those who can't. Support for cases of hardship will come through applicable funding such as pupil premium money, specified voluntary contributions and fundraising.

In some circumstances, school may not charge for items or activities set out in section 5 of this Policy. This waiving of charges is called remission. It will be at the discretion of the Governing Body and will depend on the reasons for the charges and the circumstances of the recipients.

Pupils who are 'cared for' by a local authority or whose parents or carers are receiving specified benefits are entitled to full remission of some charges outlined in Section 5. This entitlement is subject to change but usually equates to pupils being eligible for free school meals (except when they are an infant only eligible under the universal infant free school meal scheme). To find out which benefits are specified and eligible for full remission, see information on how to Apply for free school meals - GOV.UK (www.gov.uk).

Charges for other 'chargeable activities' may also be fully or partly remitted. Where appropriate governors can approve the use of the delegated budget and other funding streams such as Pupil Premium to allow 'chargeable activities' to be fully or partly remitted

Details of any remission arrangements will be made clear when parents and carers are informed of charges for individual activities.

6.1 Non-residential activities

Where the majority of time spent on a non-residential activity is *within* normal school hours, the charging regime will be as if it happens *fully within* school hours and no charge will be made. The majority of time is defined as 50% or more. Parents or carers may still be asked for a voluntary contribution.

Where the majority of the time spent on a non-residential activity is *outside* of normal school hours, the charging regime will be as if it happens *fully outside* school hours i.e., the activity becomes an 'Optional Extra' and charges will be made unless it is part of the National Curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at this school, or part of religious education. The majority of time is defined, in this case, as more than 50%.

Travel time is included when considering the time spent on an activity only when it occurs during school time (see definitions).

6.2 Residential activities

Parents and carers will be charged board and lodging for a pupil to attend a residential visit unless remission is granted.

To cover any other costs associated with a residential visit e.g., transport, activity tuition, for which charges cannot be made, they will be asked to make a voluntary contribution. No child will be denied the opportunity of attending a residential (if it is not an Optional Extra) if their parents or carers do not contribute voluntarily. Parents and carers will be offered the chance to pay in instalments through a payment plan agreed with the school before the residential, and support may be available so that all children are able to attend.

If not enough voluntary contributions are received to cover the costs of a residential, governors reserve the right to cancel it.

Charges will be made to cover all residential visit costs only where the visit is deemed to be an 'optional extra' because the number of half-day school sessions missed by the pupils taking part totals less than half of the number of half-days taken up by the activity (see definitions). In such cases, parents and carers will be told how the charges were calculated.

Example 1

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

Pupils are away from school 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.

7. Debt recovery

Our financial management Policy requires all services provided by us to be paid for in advance so it is expected no significant debts will accrue. In the event that debts are accrued, the Governing Body has authorised all reasonable measures to be taken to collect debts as part of its management of public funds. In doing so they will observe the relevant financial regulations and any other legal requirements.

Staff whose role it is, will follow school procedures to secure the collection of all debts.

A debt will be written off only after all reasonable measures (commensurate with the size and nature of the debt) have been taken to recover it. Only debts below that allowed for in the annual funding letter issued by the Secretary of State may be written off. The recovery of any sums above this amount will be referred first to the Governors and then to the Secretary of State for approval. If any debtor has a number of debts that together exceed the write-off limit, then these will be treated as a total amount.

Unless a decision to write-off a debt is demonstrably a reasonable course of action authorisation is in place to initiate legal or other action to recover debts.

A formal record of any debts written off will be maintained and retained for 7 years.

8. Arrangements for monitoring and evaluation

To ensure we achieve the aims of this Policy, governors will monitor its impact at finance meetings by receiving, on a termly basis, a financial report on activities that resulted in charges being levied, what remission was provided and why (without giving names) and the source of remissions.

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