

**TRINITY ACADEMY NEWCASTLE TRUST**

**CHARGING AND REMISSIONS**

**Approved by the Committee – January 2020  
On behalf of the Board**

**Next Review Date – January 2021**

## **1. Aims**

Our Trust aims to:

- Have robust, clear processes in place for charging and remissions
- Clearly set out the types of activity that can be charged for and when charges will be made

## **2. Legislation and guidance**

This policy is based on advice from the Department for Education (DfE) on charging for Trust activities and the Education Act 1996, sections 449-462 of which set out the law on charging for Trust activities in England. Academies are required to comply with this Act through their funding agreements.

*If applicable, add/amend:* This policy complies with our funding agreement and articles of association.

## **3. Definitions**

- Charge: a fee payable for specifically defined activities
- Remission: the cancellation of a charge which would normally be payable

## **4. Roles and responsibilities**

### **4.1 The Board of Directors**

The Board of Directors has overall responsibility for approving the charging and remissions policy, but can delegate this to a committee, an individual Director or the CEO.

The Board of Director also has overall responsibility for monitoring the implementation of this policy.

In our Trust, responsibility for approving the charging and remissions policy has been delegated to [Finance, Audit and Resource Committee].

In our Trust, monitoring the implementation of this policy has been delegated to [Finance, Audit and Resource committee].

### **4.2 The Head of School**

The Head of School is responsible for ensuring staff are familiar with the charging and remissions policy, and that it is being applied consistently.

### **4.3 Staff**

Our staff are responsible for:

- Implementing the charging and remissions policy consistently
- Notifying the Head of School of any specific circumstances which they are unsure about or where they are not certain if the policy applies

The senior leadership team will provide staff with appropriate training in relation to this policy and its implementation.

#### **4.4 Parents**

Parents are expected to notify staff or the Head of School of any concerns or queries regarding the charging and remissions policy.

#### **5. Where charges cannot be made**

Below we set out **what the Trust cannot charge for**:

##### **5.1 Education**

- Admission applications
- Education provided during Trust hours (including the supply of any materials, books, instruments or other equipment)
- Education provided outside Trust hours if it is part of:
  - The national curriculum
  - A syllabus for a prescribed public examination that the learners is being prepared for at the Trust
  - Religious education
- Instrumental or vocal tuition, for learners learning individually or in groups, unless the tuition is provided at the request of the learner's parent
- Entry for a prescribed public examination if the learner has been prepared for it at the Trust
- Examination re-sit(s) if the pupil is being prepared for the re-sit(s) at the Trust

##### **5.2 Transport**

- Transporting registered learners to or from the Trust premises, where the local authority has a statutory obligation to provide transport
- Transporting registered learners to other premises where the Board of Directors or local authority has arranged for learners to be educated
- Transport that enables a learners to meet an examination requirement when he or she has been prepared for that examination at the Trust
- Transport provided in connection with an educational visit

##### **5.3 Residential visits**

- Education provided on any visit that takes place during Trust hours
- Education provided on any visit that takes place outside Trust hours if it is part of:
  - The national curriculum
  - A syllabus for a prescribed public examination that the pupil is being prepared for at the Trust
  - Religious education
- Supply teachers to cover for those teachers who are absent from Trust accompanying learners on a residential visit

## 6. Where charges can be made

Below we set out **what the Trust can charge for**.

### 6.1 Education

- Any materials, books, instruments or equipment, where the child's parent wishes him or her to own them
- Optional extras (see below)
- Music and vocal tuition, in limited circumstances
- Certain early years provision
- Community facilities

### 6.2 Optional extras

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

- Education provided outside of Trust time that is not part of:
  - The national curriculum
  - A syllabus for a prescribed public examination that the learner is being prepared for at the Trust
  - Religious education
- Examination entry fee(s) if the registered pupil has not been prepared for the examination(s) at the Trust
- Transport (other than transport that is required to take the learner to Trust or to other premises where the local authority/governing board has arranged for the learner to be provided with education)
- Board and lodging for a learner on a residential visit
- Extended day services offered to learner (such as breakfast clubs, after-school clubs, tea and supervised homework sessions)

When calculating the cost of optional extras, an amount may be included in relation to:

- 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 (including 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 learner will not be greater than the actual cost of providing the optional extra activity, divided equally by the number of learner participating.

Any charge will not include an element of subsidy for any other learner who wish to take part in the activity but whose parents are unwilling or unable to pay the full charge.

In cases where a small proportion of the activity takes place during Trust hours, the charge cannot include the cost of alternative provision for those learners who do not wish to participate.

Parental agreement is necessary for the provision of an optional extra which is to be charged for.

### **6.3 Music tuition**

The Trust can charge for vocal or instrumental tuition provided either individually or to groups of learners, provided that the tuition is provided at the request of the learner's parent.

Charges may not exceed the cost of the provision, including the cost of the staff giving the tuition.

Charges cannot be made:

- If the teaching is an essential part of the national curriculum
- If the teaching is provided under the first access to the Key Stage 2 instrumental and vocal tuition programme
- For a learner who is looked after by a local authority

### **6.4 Residential visits**

We can charge for board and lodging on residential visits, but the charge must not exceed the actual cost.

## **7. Voluntary contributions**

As an exception to the requirements set out in section 5 of this policy, the Trust is able to ask for voluntary contributions from parents to fund activities during Trust hours which would not otherwise be possible.

Some activities for which the Trust may ask parents for voluntary contributions include:

- *Trust trips,*
- *Residential trips,*
- *Sports activities.*

**There is no obligation for parents to make any contribution, and no learner will be excluded from an activity if their parents are unwilling or unable to pay.** If the Trust is unable to raise enough funds for an activity or visit then it will be cancelled.

## **8. Activities this Trust charges for**

The Trust will charge for the following activities:

See optional extras

For regular activities, the charges for each activity will be determined by the Board of Directors and reviewed in autumn each year. Parents will be informed of the charges for the coming year in autumn each year.

## **9. Remissions**

In some circumstances the Trust may not charge for items or activities set out in sections 6 and 8 of this policy. This will be at the discretion of the Board of Directors and will depend on the activity in question.

### **9.1 Remissions for residential visits**

Parents who can prove they are in receipt of the following benefits will be exempt from paying the cost of board and lodging for residential visits:

- income-based Jobseeker's Allowance
- income-related Employment and Support Allowance
- 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 £16,190)
- Working Tax Credit run-on - paid for 4 weeks after you stop qualifying for Working Tax Credit
- Universal Credit - if you apply on or after 1 April 2018 your household income must be less than £7,400 a year (after tax and not including any benefits you get)

## **10. Monitoring arrangements**

The Head of School (Business) monitors charges and remissions, and ensures these comply with this policy.

This policy will be reviewed by Head of School (Business] every year. At every review, the policy will be approved by Finance, Audit and Resources Committee.

**Signed on behalf of the Board:**



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**Peter Carter (Chairperson of the Board)**

**Date: January 2020**