

**Trinity Academy Newcastle Trust**

**Charging and Remissions Policy**

**Approved by the Committee – March 2025  
On behalf of the Board**

**Next Review Date – March 2026**

## Statement of intent

Trinity Academy Newcastle Trust is committed to ensuring equal opportunities for all learners, regardless of financial circumstances and have created this policy to ensure we adhere to legal requirements regarding charging for school activities and meet all statutory guidance provided by the DfE.

The Trust will ensure that this policy is published on our website and provides the Trust community with details of activities for which the Trust will charge parents, and the circumstances in which they will waive any charge parents would otherwise expect to pay.

## Legal framework

This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:

- Academies Act 2010
- Children Act 1989
- DfE (2018) 'Charging for school activities'
- DfE (2024) 'Academy Trust Handbook 2024'
- Education Act 1996
- DfE (2024) 'Academy trust governance guide'
- DfE (2024) 'What academies and further education college must or should publish online'
- Education Act 1996
- Freedom of Information Act 2000
- The Charges for Music Tuition (England) Regulations 2007
- The Education (Prescribed Public Examinations) (England) Regulations 2010
- The Trust's Funding Agreement

This policy operates in conjunction with the following Trusts policies:

- Anti-Fraud and Corruption Policy
- Complaints Procedures Policy
- Data Protection Policy
- Finance Policy and Procedure Manual
- Freedom of Information Policy
- Freedom of Information Publication Scheme

## Definitions

For the purpose of this policy the following definitions will be used:

**Charge:** a fee payable for specifically defined activities.

**Remission:** the cancellation of a charge, partly or wholly, which would normally be payable.

## **Roles and responsibilities**

The Board of Directors will be responsible for:

- The management of the Trusts' delegated finances
- Ensuring the Trust acts in accordance with this policy at all times.
- Ensuring money is spent for the educational benefit of learners attending the Trust, and for the benefit of learners in other schools.
- Recognising its legal requirements regarding charging for school activities under the Education Act 1996 and meeting all additional guidance provided by the DfE.

The Head of School will be responsible for:

- Prioritising and allocating financial resources appropriately, ensuring efficiency, effectiveness, and probity in the use of public funds.
- Informing parents on low incomes and in receipt of specific benefits of the support available to them when being asked for contributions towards the cost of school visits.
- Liaising with parents and staff regarding any charges being applied and making decisions regarding appropriate remissions on a case-by-case basis.

The Admin Officers with support from the Trust finance department will:

- Process and record payments for activities, taking into account any remissions applied.
- Ensure that the correct invoices are sent to parents, and that payment is received.

## **Charging for education**

The Trust will not charge for:

- Admission applications.
- 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 learner is being prepared for by the Trust, or part of RE.
- Instrumental or vocal tuition, for pupils learning individually or in groups, unless 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 resits if the learner is being prepared for the resits at the Trust.

The Trust may charge for:

- Materials, books, instruments, or equipment, where the learner's parent wishes their child to own them.
- Optional extras.
- Music tuition (in certain circumstances).
- Use of community facilities and other commercial activities.
- Provision of information within the scope of freedom of information

## **Optional extras**

The Trust may charge for the following optional extras:

- Education provided outside of school time that is not:
  - Part of the national curriculum
  - Part of a syllabus for a prescribed public examination that the learner is being prepared for at the school
  - Part of RE
- Examination entry fees where the learner has not been prepared for the examinations at the Trust.
- Transport, other than that required to take the learner to school or to other premises where the Trust 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 learners, e.g. breakfast, after school clubs, tea, and supervised homework sessions.

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

- Materials, books, instruments, or equipment provided in relation to the optional extra
- Buildings and accommodation
- Non-teaching staff (including TAs)
- Teaching staff under contracts for services purely to provide an optional extra
- The cost, or an appropriate proportion of the costs, for teaching staff employed to provide vocal tuition or tuition in playing a musical instrument, where the tuition is an optional extra.

The Trust will not charge in excess of the actual cost of providing the optional extra divided by the number of participating learners.

In cases where a small proportion of the activity takes place during school hours, the school will not charge for the cost of alternative provision for those not participating.

The school will not charge for supply teachers to cover for teachers who are absent from school accompanying pupils on a residential visit.

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

If a charge is to be made for a particular activity, such as optional extras, parents will be informed of how the charge will be calculated.

### **Voluntary contributions**

The Trust may, from time-to-time, ask for voluntary contributions towards the benefit of the Trust or Trust activities. If an activity cannot be funded without voluntary contributions, the Trust will make this clear to parents at the outset. The Trust will make it clear to parents that there will be no obligation for parents to make a contribution. Parents will be notified regarding whether assistance is available.

No learner will be excluded from an activity simply because their parents are unwilling or unable to pay. If a parent is unwilling or unable to pay, their child will still be given an equal opportunity

to take part in the activity and the Trust will set out how places will be allocated from the outset. If insufficient voluntary contributions are raised to fund an activity, and the Trust cannot fund it via another source, the activity will be cancelled, and this will be made clear to parents.

The Trust will strive to ensure that parents do not feel pressurised into making voluntary contributions. Measures which may make parents feel pressured, such as colour coded letters and direct debits or standing order mandates, will not be sent when the Trust requests contributions.

### **Examination fees and resits**

The Trust may charge for examination fees if:

- The examination is on the set list (which includes SATs, GCSEs & Functional Skills), but the learner was not prepared for it at the Trust.
- The examination is not on the set list, but the Trust arranged for the learner to take it.
- A learner fails, without good reason, to complete the requirements of any public examination where the Board or LA originally paid or agreed to pay the entry fee.

Where a learner is entered for a second or subsequent attempt at an examination, the Trust will pay the fee. Once learners have left the Trust, resits must be taken at the Trust.

If a learner or their parent consider it to be in the best interests of the learner to request that an examination is re-marked, any fees involved must be covered by the learner or their parent. If the awarding body changes the overall grade of the result, the Trust will not be charged by the awarding body, and the parent or learner will have their fees refunded.

### **Music tuition**

The school is aware that instrumental and vocal music tuition is an exception to the rule that all education provided during school hours must be free. The Charges for Music Tuition (England) Regulations 2007 allow for charges to be made for vocal or instrumental tuition provided either individually or to groups of any size – provided that the tuition is at the request of the pupil's parents. In such cases, the charges applied will not exceed the cost of the provision, including the cost of the staff providing the tuition.

There will be no charges applied if the music tuition is an essential part of the national curriculum.

Charges will not be made if the teaching is provided under the first access to the KS2 Instrumental and Vocal Tuition Programme.

No charge for music tuition will be made in respect of pupils who are LAC.

### **Transport**

The Trust will not charge for:

- Transporting registered learners to or from the Trust premises, where the LA has a statutory obligation to provide the transport.

- Transporting registered learners to other premises where the Board or LA has arranged for learners to be educated.
- Transporting learners to meet an examination requirement when they have been prepared for the examination at the Trust.
- Transport provided for an educational visit.

### **Residential visits and Trips**

The Trust will not charge for:

- Education provided on any visit/trips that takes place during school hours.
- Education provided on any visit/trips that takes place outside school hours if it is part of the national curriculum, part of a syllabus for a prescribed public examination that the learner is being prepared for at the Trust, or part of RE.
- Supply teachers to cover for teachers accompanying learners on visits.

The Trust may ask for contributions towards residential visits to offset board and lodging, but the contribution will not exceed the actual costs (unless the residential is offset by the PE Sport Premium Primary).

Parents will be exempt from board and lodging costs if they can prove that they are in receipt of one or more of the following benefits:

- Income Support
- 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 that they are 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 four weeks after they stop qualifying for Working Tax Credit
- Universal Credit – if they apply on or after 1 April 2018, their household income must be less than £7,400 a year (after tax and not including any benefits they receive)

The Trust will provide a form for parents to submit and provide proof of receipt of one of the above benefit payments in order to be eligible for the exemption.

### **Education partly during school hours**

The Trust will follow DfE guidance when determining whether an activity is deemed to take place during school hours or not, as set out below:

- If 50 percent or more of the time spent on an activity occurs during school hours (including time spent travelling if the travel occurs during school hours), it will be deemed to take place during school hours and no charge will be made.
- If less than 50 percent of the time spent on an activity occurs during school hours, it will be deemed to have taken place outside school hours and the school may charge for the activity; however, the Trust will not charge if the activity 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 RE.

- Whatever the start and finish times of the school day, regulations require that the school day is divided into two sessions. School hours will not include the break in the middle of the day.

The remission of charges for board and lodging payments is the responsibility of the Trust. These costs will be borne by the Trust.

Any charges for extended day services will be optional.

### **Damaged or Lost Items**

The Trust may charge for the cost of replacing items that are damaged or lost due to the negligence or poor behaviour of learners or their parents. Parents will only be charged the replacement cost to purchase the same or equivalent item. The Trust will consider waiving costs in exceptional circumstances, e.g. financial hardship.

### **Remissions**

The Trust has set aside a fund to enable parents in financial difficulty to send their children on visits and activities. The funding is limited and there is no guarantee that all requests can be met. Assistance will be allocated on a need's basis, and if the full cost of the trip or activity cannot be met through assistance funding and voluntary contributions, the trip or activity will be cancelled.

Parents in receipt of any of the following benefits may request assistance with the costs of activities:

- Income Support
- 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 State Pension Credit
- Child Tax Credit, provided that they are not also entitled to Working Tax Credit, and they have an annual gross income of no more than £16,190
- Working Tax Credit run on – paid for four weeks after they stop qualifying for Working Tax Credit.
- Universal Credit – if they apply on or after 1 April 2018, their household income must be less than £7,400 a year (after tax and not including any benefits they receive)

To request assistance, parents should contact the Head of School.

### **Income generation**

In line with the ESFA's 'Academy Trust Handbook', the Trust will set fees for chargeable services at full cost and reserves the right to apply an additional rate of return when in a commercial environment.

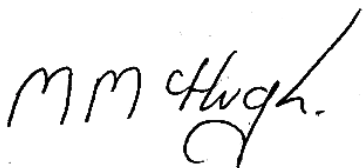
## **Freedom of Information Policy and Publication Scheme**

The Trusts Freedom of Information Policy sets out where fees may be charged for the provision of information.

### **Monitoring and review**

This policy will be reviewed at least annually by the Board.

### **Signed on behalf of the Board:**

A handwritten signature in black ink, appearing to read 'mm Hugh', written over a horizontal line.

**Michael McHugh (Chairperson of the Board)**

**Date: March 2025**