



# Charging and Remissions Policy

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Policy	<b>Charging and Remissions Policy</b>
Date of review	<b>January 2021</b>
Date of next review	<b>January 2024</b>
Lead professional	<b>Chief Financial Officer</b>
Status	<b>Statutory</b>

## 1. Introduction

1.1. The Directors recognise that it is the right of every student in an academy trust to receive a free education. However, there are circumstances where charges can be applied. This document outlines Trinity Multi-Academy Trust’s policy on what charges can be levied for activities, what remissions will be applied and the circumstances in which voluntary contributions will be requested from parents/carers.

## 2. Activities that cannot be charged

2.1. An academy **cannot** make a charge for the following:

- An admission application to any state-funded school - paragraph 1.9 (n) of the ‘School Admissions Code 2014’ rules out requests for financial contributions during any part of the admissions process
- Education provided during academy hours (including the supply of any materials, books, instruments or other equipment)
- Education provided outside academy hours if it is part of the national curriculum; this is not restricted to learning outside the classroom experiences that are specifically subject based (for example geography or science fieldwork). This also includes activities designed to fulfil requirements under the national curriculum ‘inclusion statement’ or part of a syllabus for a prescribed public examination that the student is being prepared for at the academy, or part of religious education
- Instrumental or vocal tuition for students learning individually or in groups, unless the tuition is provided at the request of the student’s parent

- Entry for a prescribed public examination if the student has been prepared for it at the academy
- Examination re-sit(s) if the student is being prepared for the re-sit(s) at the academy

## Transport when:

- Transporting registered students to or from academy premises, where the local education authority has a statutory obligation to provide transport
- Transporting registered students to other premises where the Governing Body or local authority has arranged for students to be educated
- Transport that enables a student to meet an examination requirement when he/she has been prepared for that examination at the academy
- Transport provided in connection with an educational visit

## 3. Charging for Academy Activities

3.1. A Principal will consider asking parents/carers to meet the costs of activities detailed below. In all cases the charge shall not exceed the actual cost of providing the activity/materials.

- Educational trips and residential visits - transport, board and lodging
- Music and vocal tuition - where students undertake peripatetic instrumental or vocal tuition above the national curriculum requirements and at the parents request. These may be individual or small-group lessons
- Examinations - where a student has failed for no good reason or withdraws from an examination without the agreement of the academy a charge will be made. The Governors reserve the right to charge for the re-sitting of exams or modules
- Non-educational trips - as an 'optional extra' that is not part of the national curriculum. Parents should be aware that the trip may be cancelled if there are insufficient students to make the trip viable
- Damage or loss to academy or trust property - a charge to parents/carers will be made when damage or loss of property occurs through wilful and negligible behaviour of their child. The charge will not exceed the actual cost to replace or repair
- Equipment, books, materials and instruments which the parent/carer wishes to have ownership over. This includes materials used in practical subjects, where parents wish to own the finished product
- Replacement equipment or educational materials (e.g. planner, uniform items) where the child has lost or broken materials supplied by the academy

- Extracurricular clubs or after/out of school clubs. Charges for equipment, materials or to employ an external provider to deliver these clubs will be made. This will cover the cost of providing the provision
- 3.2. Any charges will be made after communication with parents/carers and will not exceed the cost of the provision. Costs will be proportional to each student.
  - 3.3. Activities should not commence until parent/carer confirmation has been received.
  - 3.4. The Principal and Senior Leader budget holders in each academy are delegated with the authority to subsidise some or all of the above charges at his/her discretion.
  - 3.5. Principals and other appropriate Senior Leaders have delegated authority to review all new activities that the academy engages in. They are responsible in assessing the cost benefit analysis and ensure all overheads will be recovered prior to engagement and that it fits with the academy budget and resources available.

## 4. Remissions

- 4.1. In order to remove financial barriers from disadvantaged students, some activities and visits where charges can be made will be offered at no, or a reduced, charge to parents/carers in receipt of:
  - 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 the parent/carer is not also entitled to Working Tax Credit and has an annual gross income of no more than £16,190)
  - Working Tax Credit run-on - paid for 4 weeks after the parent/carer stops qualifying for Working Tax Credit
  - Universal Credit - if the parent/carer applied on or after 1 April 2018 the household income must be less than £7,400 per year (after tax and not including any benefits the parent/carer may get)
- 4.2. Other exceptional cases not falling within the criteria listed above will also be considered.

- 4.3. As an indicator of reducing the cost of the trip, the trust invites parents/carers to approach the relevant academy. Conversations will be discussed in the strictest confidence and informed back to the applying parent/carer. The relevant academy will aim to reduce the cost of a curriculum enhancing trip/visit by up to 33% if the parent/carer is in receipt of any of the above benefits or the student classes as a FSM Student. The final decision for these reductions is delegated to the Senior Leader who holds the relevant budget, once they have received all the information available for the trip/visit in question. All decisions must refer to the Finance and Operations Manager in each academy to advise on consistency in making reductions.
- 4.4. For LAC (Looked-after Children) and SGO (Special Guardianship Order) students the academy, whilst in receipt of a higher rate of Pupil Premium, called LAC - premium, will aim to reduce the cost of a curriculum enhancing trip/visit by up to 50%. It is also accepted that due to certain external policies it can take longer for trip funding to appear through the Social Services route so these specific students and their parents/carers are granted extended deadlines to make payment where necessary.

## 5. Charging for External School/Education Provider Support and Trinity Institute of Education Initiatives

- 5.1. The trust or an academy within it can make a charge to cover costs of providing external support to other trusts, academies and schools upon request. The charges will not exceed the actual cost of providing the support but will include all charges required to provide the support. All costs to create the required support such as administration, the development and implementation of the support will be covered by the agreed charge prior to commencement. The Principal for each academy is responsible for ensuring the academy includes all costs within the agreed charge and also that the academy is not impacted negatively due to the offer of school to school support.
- 5.2. Trinity Institute of Education (TIE) has a separate charging policy as per Appendix A in this document. This charging policy is in place to ensure there is clarity for anyone who wishes to use TIE for any provision required; it is also placed to ensure the long term viability and sustainability of the Institute. All charges are set and agreed by strategic partners to cover costs. These costs include the deployment, training and courses offered plus the relevant administration charges to facilitate the event or activity.
- 5.3. Where the academy has nursery facilities a charge is made to parents/carers for childcare hours over and above the statutory arrangements for free childcare. Payment is made via standing order and the trust has arrangements under the Childcare voucher scheme (as a childcare provider and offered as an employee benefit).

## 6. Complaints

- 6.1. For parents/carers who are unhappy at any charging or remissions made under this policy they should speak to the relevant academy's nominated officer in the first instance who is responsible

for the specific trip, visit, tuition or materials. If agreement cannot be reached amicably each academy has a Complaints Policy on their website to advise the next steps in the process.

The charges, including those for the deployment of NLE/LLE and SLEs, have been determined by the Trinity Institute of Education (TIE) Strategic Group and will be reviewed annually. This is to ensure the process is equitable and consistent.

## 1. NLE/SLE/LLE deployment

At the beginning of any school support the cost will be determined and agreed with TIE.

NLE Support Contracts will be drawn up for NLE support arranged through the National College for Teaching and Leadership (NCTL) Collaborative Fund. A fully costed-out Deployment Action Plan will be produced. The costs to be used are detailed below.

It will be up to the NLE school to decide how to use the funding it receives from TIE.

## 2. Charges

For all staff deployments for school to school support, a sustainability charge will be retained by TIE to cover administration costs and an element to be reinvested into the TIE Development Fund; the balancing amount will be received by the school providing the support. The TIE charges also ensure the required level of quality assurance is completed for any work within TIE.

The TIE sustainability charge consists of a standard 10% of the grant funding allocated direct to the Institute with the remaining funds transferred (upon receipt of invoice) to the school providing the support.

## 3. Primary school agreements

### National Leaders of Education:

£400 per day (sustainability charge applies). The above figure has assumed that most NLEs are experienced headteachers and the reimbursement of £360 to the NLE's school would cover the daily rate for a salary of up to £56k.

### Local Leaders of Education:

£350 per day (sustainability charge applies). The above figure has assumed that most LLEs are experienced headteachers and the reimbursement of £315 to the LLE's school would cover the daily rate for a salary of up to £49k.

### Specialist Leaders of Education:

£350 per day (£380 for maths support per day, sustainability charge applies). The above figure has

assumed that most SLEs will be at middle leader level and the reimbursement of £315 (or £342 if maths) to the SLE's school would cover the daily rate for a salary of up to £49k (or £53k if maths).

### Senior Leadership Team:

£350 per day (£315 to the school; sustainability charge applies).

### Aspiring SLEs/Other Staff:

£250 per day (£225 to the school providing the support; sustainability charge applies). The above figure has assumed that most aspiring SLEs will be at middle leader level and the reimbursement of £225 to the aspiring SLE's school would cover the daily rate for a salary of up to £35k.

## 4. Secondary school agreements

### National Leaders of Education:

£650 per day (£585 to the school providing the support; sustainability charge applies). The above figure has assumed that most NLEs are experienced headteachers and the reimbursement of £585 to the NLE's school would cover the daily rate for a salary of up to £90k.

### Local Leaders of Education:

£550 per day (£500 to the school providing the support; sustainability charge applies). The above figure has assumed that most LLEs are experienced headteachers and the reimbursement of £500 to the LLE's school would cover the daily rate for a salary of up to £77k.

### Specialist Leaders of Education:

£450 per day (£480 for maths support per day; sustainability charge applies). The above figure has assumed that most SLEs will be at middle leader level and the reimbursement of £405 (£432 for maths) to the SLE's school would cover the daily rate for a salary of up to £62k (£67k for maths).

### Senior Leadership Team:

£450 per day (£405 to the school providing the support; sustainability charge applies).



### Aspiring SLE's/Other Staff:

£250 per day (£225 to the school providing the support; sustainability charge applies). The above figure has assumed that most aspiring SLEs will be at middle leader level and the reimbursement of £225 to the aspiring SLE's school would cover the daily rate for a salary of up to £35k.

There is a minimum charge of half a day.

Bespoke packages can also be arranged, please contact our email address - [contactus@tie.trinitymat.org](mailto:contactus@tie.trinitymat.org) for all enquiries.

## 5. Course/Workshop/Conference Charges

The cost per attendee will be determined by the TIE Finance Manager.

Non-attendance at a course on the day of the event will incur full course fees.

If prior notice of non-attendance is given to the TIE Finance Manager and a substitute attendee is available no admin fee will be charged.

If prior notice of non-attendance is given to the TIE Finance Manager and no substitute attendee is available, a sliding scale of charges will be applied dependent upon the notice given:

- 1-7 days' notice - 100% charge
- 7-14 days' notice - 75% charge
- 14-21 days' notice - 25% charge
- 21+ days' notice - no charge

If cancellation is due to an Ofsted inspection, the cost of the course can be used to pay for another course within the development programme.

Within the cost to attend a course a central TIE charge is included to support future development/activities. The usual percentage charge of 15% of the income is claimed by the Institute as a sustainability charge for future activity, this can be agreed and negotiated with the TIE Finance Manager.

## 6. Charges to TIE for the provision of staff to facilitate CPD programmes:

Funding will be reimbursed to the 'host' school upon agreement to facilitate an event. The amount of reimbursement will be agreed at the outset prior to the planning of the event.

### The 'host' school will invoice TIE for:

The cost for a member of staff to deliver the CPD event plus half the CPD event time for planning and preparation (for example if a CPD course is run for 3 days the invoice will be submitted for 4.5 days). Costs will include actual salary plus on-costs. Please contact [d.allen@trinitymat.org](mailto:d.allen@trinitymat.org) if you require assistance calculating this.

Any room hire and refreshment costs; the cost of these charges to be notified to TIE at the point of the booking so that costs per delegate can be calculated by Trinity Institute of Education.

For further information please contact Institute Administration at [contactus@tie.trinitymat.org](mailto:contactus@tie.trinitymat.org) for all enquiries.