



TITLE: Fees Policy	REF: FIN001	VERSION: 4
APPROVAL BODY: Activate Learning Corporation	DATE: 16 April 2018	REVIEW DATE: March 2019
LEAD PERSON: Group Director of Finance		
VERSION	REVIEWER/APPROVAL	REVIEW NOTES
1. 23 March 2018	GET	Full Review
2. 16 April 2018	Activate Learning Corporation	

FEES POLICY

Background

- 1.1 This policy sets out the requirements for the charging of fees and the rationale behind the fee structure as well as the arrangements for making refunds.
- 1.2 The fees policy is designed to provide a clear set of criteria for course charges and to avoid ambiguity and inconsistency.
- 1.3 Fees in some cases are subject to government guidelines, via the FE funding bodies and the Higher Education Funding Council for England (HEFCE), which provide the framework in which the fees are decided.
- 1.4 Some students will be entitled to be fully funded by the government: 16-18 learners and 19+ learners who meet the criteria for remission. Other students must pay fees.
- 1.5 Higher Education students are not entitled to any fee remission.

Scope

- 2.1 The fees policy encompasses all fees and charges associated with courses offered by Activate Learning including those for:
 - ESFA funded students
 - Non-government funded students
 - Higher education students
 - 14-16 year-old students
 - Advanced Learner Loans (19+ year olds)
 - International Students
- 2.2 Consulting fees are not within the scope of this policy and are subject to a separate set of procedures.

2.3 The fees policy will be reviewed annually.

2.4 These fees will include:

- Tuition fees
- Registration and examination fees
- Trip fees
- Kit and Material fees
- Travel contributions

Intent / purpose

3.1 The intent of the fees policy is to ensure that the method of calculation of all fees charged to students and employers is fair and transparent.

3.2 The policy sets out the principles for fee collection, fee refunds and appeals against refund decisions.

Payment of Fees and Payment by Instalment

4.1.1 All students are required to pay their fees in full or to have entered into an agreed payment plan at or before enrolment.

4.1.2 The preferred methods of payment are:

- Some major credit or debit cards
- Bank transfer
- Advanced Learner loan
- Online payment via a payment provider (paypal)
- Direct debit as part of an instalment plan

4.1.3 In certain circumstances, other payment methods can be used including:

- Cash payments up to the value of £100.00
- Cheques

4.1.4 All students may request to pay course fees in instalments subject to the following conditions:

- The student must be a UK / EU national
- The course must be delivered over 10 weeks or more
- The course fee must be over £200.00 for a short plan or over £400.00 for a long plan, please see annex 1 for details of these plans
- 40% of the course fee is paid at enrolment
- The student agrees to pay the balance of the fees by direct debit in seven instalments for programmes over seven months (long plan) and in two instalments for

programmes less than seven months (short plan)

- A £10 instalment administration fee is payable at enrolment
- If a student withdraws from the course, they will remain liable for any outstanding balance subject to fee refund procedures (see section 4.11)

The schedule of monthly instalments for the academic year is attached at Annex 1 to this policy.

4.1.5 All students studying on Higher National programmes may request to pay course fees in instalments subject to the following conditions:

- The student must be a UK / EU national
- The course must be delivered over 10 weeks or more
- Fees may be paid in three instalments in line with SF3 payments; one third on enrolment, one third in January and the final third in April
- In line with Government guidelines, no administrative fee will be charged for students paying by installments

4.1.6 Advice and Admission should collect all payments.

Non-payment of Fees

4.2.1 Students can be enrolled only if they:

- Pay their fees in full; or
- Provide a signed sponsor letter for settlement of fees; or
- Complete a Direct Debit form, have bank details verified and payment of the deposit and fee for the installment plan needs to be taken at the point of enrollment
- Have an Advanced Learner Loan approved or pending (4 weeks grace to have loan approved)
- Cases of hardship should be referred to Advice and Admissions for financial support information

4.2.2 A student will not be enrolled if they have any unpaid amounts remaining from previous academic years or from a previous course.

4.2.3 In the event of non-payment Activate Learning reserves the right to exclude the student from course and examinations. The student will be referred to the Credit Controller who will initiate debt recovery actions. In the event of non-payment the student is likely to be withdrawn from the programme. If appropriate, debtors are at risk of being referred to external parties who may seek payment of fees and recovery of costs through the courts.

4.2.4 If a direct debit is cancelled by a student a £20 administration fee will be levied, and the outstanding amount will become payable immediately in full.

4.2.5 If a direct debit is rejected due to a lack of funds, a £20 administration fee will be payable to cover the extra administration involved. In these cases a student will be provided a 7 day grace period to settle the instalment and continue with the instalment plan, failing which the outstanding amount will become payable immediately. If a direct debit payment is refused more than twice, then the option for the student to pay via an instalment plan will be withdrawn and any outstanding amount will become payable immediately in full.

Student Fees and Charges

4.3.1 Students funded by the Education and Skills Funding Agency (ESFA) will be charged according to the Funding Guidelines given in the current specifications for further education colleges.

4.3.2 Fees for courses subject to Advanced Learner Loans will be charged at the maximum loans value as advised by the ESFA.

4.3.3 Fees will be charged to the sponsoring employers of students who enroll on Work Based Learning programmes, including Apprenticeships.

4.3.4 The total fee charged to a student will comprise some or all of the following components; tuition fees, materials, examination costs, visits/residential costs.

Student type	Charges for	No charges for
Fully funded students aged 16-18 and those aged 19-24 with learning difficulties/disabilities	<ul style="list-style-type: none"> • Mandatory visits and residentials • Optional materials and equipment that can be retained • Optional residentials and trips 	<ul style="list-style-type: none"> • Tuition fees • First sitting of examinations • Consumables and the use of equipment
Students aged 19+ not hitting the minimum qualification	<ul style="list-style-type: none"> • Optional materials and equipment that can be Retained • Optional residentials and trips 	<ul style="list-style-type: none"> • Tuition fees • First sitting of examinations • Consumables and the use of equipment • Mandatory visits and residentials
19+ over the qualification level	<ul style="list-style-type: none"> • Tuition fees • First sitting of examinations • Materials, consumables and the use of equipment • Mandatory visits and residentials • Optional residentials and trips 	
19+ Advanced Learner Loans	<ul style="list-style-type: none"> • Tuition fees • Optional residentials and trips 	<ul style="list-style-type: none"> • First sitting of examinations • Materials and consumables • Mandatory Visits and residentials
Higher Education Students	<ul style="list-style-type: none"> • Tuition fees • Materials, equipment or clothing(the cost of which will be published to the student prior to enrollment) • Optional activities and visits, where the indicative cost will be published to students in advance of enrolment 	<ul style="list-style-type: none"> • Material fees (other than in exceptional circumstances, the cost of which will be published to the student prior to enrollment)

Non-Government funded Students	<ul style="list-style-type: none"> • Tuition fees • First sitting of examinations • Materials, consumables and the use of equipment • Mandatory visits and residentials • Optional residentials and trips 	
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4.3.5 If the student changes their course, the student may be liable to owe fees for the new course.

4.3.6 Fees may be reviewed according to the circumstances of individual students. The tutor is responsible to advise the student about the financial implication.

4.3.7 Activate Learning will require documentary evidence of the below, where relevant, to assess whether they are eligible for fee remission:

- Age
- Identity
- Residency Status
- Previous Qualifications

4.3.8 It is the responsibility of the student to provide the correct information for fee assessment purposes before enrolment. If at a later date correct information comes to light that renders a student liable for fees, they will be charged.

Awarding Body Registrations and Examinations

4.4.1 External applicants who are not enrolled at Activate Learning will not be entered for examinations at Activate Learning.

4.4.2 Other than in exceptional circumstances, if a current student is entered for a re-sit examination at Activate Learning they will have to pay all the examination fees regardless of age.

4.4.3 A Faculty Director will decide whether the re-sit charge should be waived and the cost assumed by the faculty.

4.4.4 If students are required to register directly with professional awarding bodies, the registration is not paid at enrolment but is paid directly to the professional awarding body by the student. The courses that are subject to these conditions are mainly professional courses, such as AAT, IPD and CIM.

4.4.5 When examination and registration costs are payable direct to the examining body, it will be

made clear in the Activate Learning prospectuses and/or course fact sheets.

Amendment to fees

- 4.5.1 All fees are charged on an annual basis and reviewed annually, with the exception of Advanced Learner Loans which apply to the duration of the course.
- 4.5.2 Although Activate Learning will endeavor to not change course fees from those which are published, in exceptional circumstances we reserve the right to do so.
- 4.5.3 Periodically discount schemes may be introduced where a percentage discount is applied in the case of multiple and sequential enrolments.

Bursaries

- 4.6.1 Students may be eligible for grants to contribute towards certain cost of study through Activate Learning bursary scheme. The Advice and Admissions team can advise on eligibility.

Higher Education Fees

- 4.7.1 The Higher Education Funding Council for England (HEFCE) provides the national framework in which maximum fees levels are decided.
- 4.7.2 Higher Education students will be charged tuition fees set by Activate Learning or a University partner. This is charged depending upon the qualification and mode of study according to guidance from the Higher Education Funding Council and the Student Loans Company, in relation to maximum fee levels.

International Students

- 4.8.1 International Students place on their course is dependent on their visa being granted.
- 4.8.2 The student needs to pay at least 50% of their course fees (inclusive of the £21.00 CAS fee) to confirm their place on the course before the visa process can begin.
- 4.8.3 Once the student's visa is approved, the remaining balance is to be paid before or at enrollment.
- 4.8.4 In case the visa is rejected, the paid fees are refunded minus a £200.00 administration fee plus the £21.00 CAS fee if applied.

Advanced Learner Loans

- 4.9.1 If a student chooses to take out an Advanced Learner Loan they will be subject to the terms and conditions laid down by the Students Loan Company.
- 4.9.2 If a student applies for an Advanced Learner Loan and it is rejected or refused, the student will become liable for settlement of the fee in full in accordance with the requirement of the fees policy.

14 – 16 Year-olds and students from schools

- 4.10.1 For students who are under 16 and studying at school and are completing courses at Activate Learning, the student's school will be liable to pay the fee.
- 4.10.2 For individual students who are not on a school roll, an agreement is made with the local Education Authority or other statutorily funded body about the acceptance of the student and a transfer fee is agreed and will be collected by funding returns.
- 4.10.3 The fees for new arrivals into the country are agreed with the local authority and are collected by funding returns.

Fee Refunds

- 4.11.1 A full refund will be made automatically if Activate Learning cancels a course.
- 4.11.2 The table below details some of the circumstances a student can request a fee refund for:

Reason	Value of Refund	Evidence Required
Withdrawing for a serious medical reason	The refund will be calculated, pro rata, according to the number of weeks attended	A doctor's certificate needs to be submitted with the application for a refund on medical grounds
The student has never attended the course or withdraws within two weeks (for courses longer than 10 weeks)	A full refund will be processed	The student should request the refund in writing

- 4.11.3 If the student withdraws after more than two weeks, there is no entitlement to a refund unless there are extenuating circumstances. This is at the discretion of the Executive Director of the Faculty. In order to assess whether you have extenuating circumstances, you must write to the Executive Director of the Faculty providing evidence before your circumstances can be considered. If there are no special circumstances and you have withdrawn from the course, then the full fees will remain payable.
- 4.11.4 Refunds will also be given to a student with appropriate evidence and payment if it is agreed an employer or the Discretionary Fund is to pay their course fees on their behalf. All refunds will be made once a completed refund form signed by the department budget holder and a team leader for Advice and Admissions.
- 4.11.5 If as part of a formal complaint the complainant requests a refund of fees; the investigating manager must make a refund recommendation to the faculty budget holder. The budget holder can authorise the refund, if appropriate, as a part of the investigation outcome.
- 4.11.6 Costs will be deducted from refunds to cover examination costs and registration fees.
- 4.11.7 Refunds will be given in the method by which they were paid, with the exception of cash, cheque

and web payments made over 90 days prior, in which case the fee will be refunded by BACs.

4.11.8 Refunds are made weekly.

4.11.9 If the student wishes to appeal against any decision made they should write to the Group Finance Director stating the reasons for their appeal. If the student feels that their application for refund was not handled appropriately they may seek redress through the Activate Learning's Complaints Procedure.

Annex 1 – Fee Instalment Plans for the Academic Year

Instalments commence from the month of enrolment not the course start date

All payments (except initial payment) will be taken on the first working day on or after the 1st of each month

	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Wks to pay	
Sept Long	40%	10%	10%	10%	10%	10%	10%														32
Sept Short	40%	30%	30%																		12
Oct Long		40%	10%	10%	10%	10%	10%	10%													32
Oct Short		40%	30%	30%																	12
Nov Long			40%	10%	10%	10%	10%	10%	10%												32
Nov Short			40%	30%	30%																16
Dec Long				40%	10%	10%	10%	10%	10%	10%											32
Dec Short				40%	30%	30%															16
Jan Long					40%	10%	10%	10%	10%	10%	10%										28
Jan Short					40%	30%	30%														12
Feb Long						40%	10%	10%	10%	10%	10%	10%									28
Feb Short						40%	30%	30%													12
Mar Long							40%	10%	10%	10%	10%	10%	10%								28
Mar Short							40%	30%	30%												12
Apr Long								40%	10%	10%	10%	10%	10%	10%							28
Apr Short								40%	30%	30%											12
May Long									40%	10%	10%	10%	10%	10%	10%						28
May Short									40%	30%	30%										12
June Long										40%	10%	10%	10%	10%	10%	10%					28
June Short										40%	30%	30%									12
July Long											40%	10%	10%	10%	10%	10%	10%				32
July Short											40%	30%	30%								12
Aug Long												40%	10%	10%	10%	10%	10%	10%			32
Aug Short												40%	30%	30%							12

Annex 2 – Useful Links

- <https://www.gov.uk/guidance/16-to-19-education-funding-guidance> - link to ESFA funding guidance for 16 to 18 year olds
- <https://www.gov.uk/guidance/sfa-funding-rules> - link to ESFA funding guidance for students aged 19+
- <https://www.gov.uk/student-finance> - link to Student Finance England for Higher Education courses
- <http://www.slc.co.uk/> - link to Student Loan Company website

Equality Impact Assessment

We believe that people from a range of backgrounds and experiences can enhance the life and development of the institution and that all individuals should be treated on the basis of individual merit and without prejudice. Activate Learning will, therefore aim to provide an education service which actively promotes equality of opportunity and freedom from discrimination on grounds of protected characteristics, namely age, disability, sex, gender reassignment, marriage and civil partnerships, pregnancy and maternity, race, religion and beliefs, sexual orientation and socio economic status in both education and employment. Activate Learning expects all employees, students, and associated partner organisations to adopt this policy.

Activate learning is committed to carrying out Equality Impact Assessments (EIA) on its

Name and role of person(s) carrying out EIA	Moray Inglis Group Director of Finance
Name of policy, procedure, practice, plan or process	Fees Policy
What is the main aim or purpose of the policy, procedure, practice, plan or process?	The Fees Policy is designed to provide a clear set of criteria for course charges and to avoid ambiguity and inconsistency
Is this a new (N) or existing (E) policy, practice, plan or	Existing policy, revised for 2017-18
Person responsible for policy, practice, plan or process	Moray Inglis, Group Director of Finance Miriam O'Leary, Group Director of Marketing and Customer Experience
Date of equality impact assessment	March 2018

Evidence

What information has been gathered to inform the EIA? Consider, for example, people's views from focus groups and surveys, and statistical information or other relevant evidence. Consider both quantitative and qualitative information	Previous policies, feedback and concerns
What has this information revealed?	Previous fees policy issues have not given rise to concerns regarding equality
Is further information required? If so, how will this information be gathered and used?	No further information deemed necessary

Impact

<p>Has the equality impact assessment identified potential or actual areas of concern, negative impact, or areas of inequality? If so, please tick the relevant boxes.</p>	<input type="checkbox"/> Race Disability <input type="checkbox"/> Gender (including Gender reassignment) Pregnancy / maternity <input type="checkbox"/> Sexual orientation <input type="checkbox"/>	<input type="checkbox"/> Age <input type="checkbox"/> Religion and belief <input type="checkbox"/> Marriage / civil partnership <input type="checkbox"/> Socio-economic <input type="checkbox"/> Other area of equality (please state)
<p>Has the equality impact assessment identified areas that would further advance equality if changes were made, for example fostering good relations between different groups, meeting needs or encouraging participation? If so, please tick the relevant boxes.</p>	<input type="checkbox"/> Race Disability <input type="checkbox"/> Gender (including Gender reassignment) Pregnancy / maternity <input type="checkbox"/> Sexual orientation <input type="checkbox"/>	<input type="checkbox"/> Age <input type="checkbox"/> Religion and belief <input type="checkbox"/> Marriage / civil partnership <input type="checkbox"/> Socio-economic <input type="checkbox"/> Other area of equality (please state)
<p>Please provide a brief summary of the outcomes of the EIA including</p> <ul style="list-style-type: none"> • Issues identified in the EIA • Areas of potential inequality • Opportunities to further advance equality • Opportunities to foster good relations 	<p>No concerns noted regarding areas of potential inequality</p>	

Action - Equality Action Plan

Issue	Planned Actions for Improvement	Expected Outcomes and Targets with Milestones & Target Dates	Person Responsible for Completion
N/a			
<p>If the action proposed will not fully eliminate potential or actual negative impact, Please state:</p> <ul style="list-style-type: none"> • Why is this and how can it be justified? <p>Please discuss this issue with your senior manager</p>			