



## **FEE POLICY 2023-24**

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## **POLICY OBJECTIVES**

The policy seeks to ensure:

- generation of income
- fees are fair, equitable and clear
- consistent calculation and application of fees and associated charges across the curriculum
- reduction in barriers to participation presented by fees and associated charges by providing flexible payment options and/or by assisting learners to access appropriate financial support
- there are appropriate and effective targets relating to fee income generation and that fee income performance is regularly reviewed against these targets

This will be achieved by:

- ensuring a balanced curriculum that offers free to access, part-subsidised and full-cost options
- ensuring learners can access several different payment options so as not to inadvertently disadvantage any part of the community
- clearly stating the costs involved in each programme or course; and to ensure learner understanding of these before enrolment
- ensuring staff understanding of the costs that impact on the viability of an activity when setting a pricing structure or additional fees

## **POLICY**

### **General Principles**

- all elements of the policy are to be reviewed annually
- no change to the policy is to disadvantage any individual learner part way through an agreed programme of study
- fees are to comply with DFE/ESFA (Department of Education and Education and Skills Funding Agency) guidelines

### **Fees**

- all course fees must be paid before or at enrolment, or an instalment arrangement agreed and in place to secure enrolment on a course
- Advance Learner Loan (ALL) learners must pay full fees on some courses
- additional fees such as equipment, material, etc are required on some courses, these then become the property of the learner at the end of the course
- learners aged 19 or over, must pay all course fees, unless eligible for free tuition fees (see below)
- learners who are aged 19 or over at the start of the course may be eligible for an advanced learning loan to cover the fees (see below)
- all fees due **MUST** be paid before the learner can be entered for any examination or awarded any qualification
- Non-EU/UK learner fees will be higher as they are not eligible for government funding

Where the policy refers to a learner's age being 19 (an adult learner), this relates to the learner being aged 19 on the 31 August within the funding year they start a learning aim. For all other purposes, the age of the learner is at the start of each learning aim.

## Payment of Fees and Instalments

Payment of fees may be made by cash, credit or debit card, cheque, via the website ([www.onsourcesouthwest.co.uk](http://www.onsourcesouthwest.co.uk)) and in the case of instalments by Direct Debit.

### By Payment Plan

While courses offer value for money, some learners may find it helpful to spread payments over a period of time. For personal enrolments there is a payment banding system available to make payment for individual courses easier:

- **Band 1** – individual courses with a fee of less than £250.00, and **under** 15 weeks duration, to be paid in full on enrolment
- **Band 2** – individual courses with a fee between £200.00 and £500.00, and **over** 15 weeks duration, require 25% of the total course fee to be paid on enrolment. The remaining balance to be paid in 3 equal instalments once the course has started.
- **Band 3** – individual courses with a fee between £501.00 and £1,000 require 25% of the total course fee to be paid on enrolment. The remaining balance to be paid in 8 equal instalments once the course has started
- **Band 4** – courses costing over £1,000 will require a credit check, please contact us on 01752 660713 to discuss options

### Employer Paid

If an employer is paying the fees, the learners will need to provide a formal letter on headed paper detailing the costs covered before enrolment. Employer fees are payable in full on receipt of an invoice. Instalment plans are not available to employers or sponsors who may agree to pay on a learner's behalf. If a learner withdraws from a course, the balance of any unpaid fees are payable in full.

### Enrolment

When enrolling on a course all learners must be made aware of any fees due in respect of the course. Where courses are fully funded by grant funding bodies the learner shall have no liability for tuition fees, as long as accurate information has been provided by the learner which is relevant to the fee concession received. Where information provided is inaccurate and as a result the learner's enrolment does not attract grant funding, OCSW reserves the right to charge a fee.

## **Government Contribution for Adult Learners**

### **Definitions**

Fully funded – government will pay full cost of qualification

Co-funded – government will pay 50% towards qualification

Loan funded – Advanced learner loan

### **19- to 23-year-olds**

#### **Fully Funded**

- English and maths for those aged 19 and over, up to and including level 2; Must be delivered as part of the legal entitlement qualifications;
- Essential Digital Skills Qualifications up to and including level 1; Must be delivered as part of the Digital legal entitlement qualifications;
- First full level 2 (excluding English & maths and Digital); First full level 2 must be delivered as part of the legal entitlement qualifications. Level 2 provision from the local flexibility offer will not be funded for 19 to 23-year-olds who do not have a first full Level 2
- Learning aims up to and including level 2, where the learner has already achieved a first full level 2, or above (see Local flexibility and legal entitlements section); For those who meet the unemployed criteria or who are in receipt of a low wage;
- English for speakers of other languages (ESOL) learning up to and including level 2; For those who meet the unemployed criteria or who are in receipt of a low wage;
- Level 3 legal entitlement (learners first full Level 3); First full level 3 must be delivered as part of the legal entitlement qualifications;
- Level 3 free courses for jobs offer; Learners without a full level 3 or above can access a qualification on the Free Courses for Jobs offer qualification list; Learners who already hold a level 3 or above and meet the definition of unemployed or who are in receipt of low wage.

#### **Co-Funded**

- For those who do not meet the definition of unemployed or do not meet the eligibility criteria for learners in receipt of low wage;
- For those who do not meet the definition of unemployed or do not meet the eligibility criteria for learners in receipt of low wage.

#### **Loan funded**

- Learning aims to progress to a full level 2 – up to and including level 1; Must be delivered as entry or level 1 provision from local flexibility; Level 3 Advanced learner loans; A learner has already achieved a full level 3 and exhausted their eligibility for the Free Courses for Jobs offer; Loan funded

**24+****Fully Funded**

- English and maths for those aged 19 and over, up to and including level 2; Must be delivered as part of the legal entitlement qualifications;
- Essential Digital Skills Qualifications up to and including level 1; Must be delivered as part of the legal entitlement qualifications;
- Full Level 2 (excluding English and maths); For those eligible through unemployed or in receipt of a low wage; Fully funded. For those who do not meet the definition of unemployed or do not meet the eligibility criteria for learners in receipt of low wage: Co-funded
- Level 3 free courses for jobs offer; Learners without a full level 3 or above accessing a qualification on the free courses for jobs offer qualifications list;
- Learners who already hold a level 3 or above and meet the definition of unemployed or in receipt of low wage;
- English for speakers of other languages (ESOL) learning up to and including level 2; For those who meet the unemployed criteria or who are in receipt of a low wage;
- Learning aims up to and including level 2, where the learner has not achieved a first full level 2, or above (Local flexibility and legal entitlements); For those eligible for their first level 2 as they meet the unemployed criteria or who are in receipt of a low wage; Fully funded.

**Loan funded**

- Level 3 and over where 24+ learners are not eligible for the Free Courses for Jobs offer, providers must refer to Advanced Learner Loans rules.

**Co Funded**

- For those who do not meet the definition of unemployed or do not meet the eligibility criteria for learners in receipt of low wage:
- Learning aims up to and including level 2; for those who do not meet the definition of unemployed or do not meet the eligibility criteria for learners in receipt of low wage:
- English for speakers of other languages (ESOL) learning up to and including level 2; For those who do not meet the definition of unemployed or do not meet the eligibility criteria for learners in receipt of low wage.

**Definition of Unemployed**

For funding, a learner is defined as unemployed if one or more of the following apply:

- they receive Jobseeker's Allowance (JSA), including those receiving National Insurance credits only
- they receive Employment and Support Allowance (ESA)
- receive Universal Credit (UC), and their take-home pay as recorded on their UC statement (disregarding UC payments and other benefits) is less than £617 a month (learner is sole adult in their benefit claim) or £988 a month (learner has a joint benefit claim with their partner)
- they are released on temporary licence (RoTL) and studying outside a prison environment and not funded by the Ministry of Justice

## **Discretion policy**

OCSW can at its discretion fully fund learners where both of the following conditions apply:

- the learner receives other state benefits (listed below) and their earned income (disregarding benefits) is less than £617 a month (learner is sole adult in their benefit claim) or £988 a month (learner has a joint benefit claim with their partner), and
- the learner wants to be employed, or progress into more sustainable employment, and their earned income (disregarding UC and other benefits) is less than £617 a month (learner is sole adult in their benefit claim) or £988 a month (learner has a joint benefit claim with their partner), and OCSW is satisfied identified learning is directly relevant to their employment prospects and the local labour market needs

## **Discretionary Waivers**

Examples of the benefits that will be accepted for Fee Remission on funded courses:

- Council Tax Benefit, administered by local authorities
- Employment and Support Allowance
- Housing Benefit
- Income Support
- Working Tax Credit

Evidence of the benefit must be provided at enrolment and be dated within six weeks of the course start date or clearly indicate that the learner remains in receipt. Learners will be made aware of any financial support that may be available to them.

## **Low Wage Waiver**

Individuals who are employed, or self-employed, and would normally be co-funded for provision up to level 2 but who earn less than £20,319 annual gross salary. To qualify for this waiver, you must provide evidence of your gross annual wage which may be a wage slip or universal credit statement dated within 3 months of your learning start date. Self-employed Learners who wish to use this waiver will need to provide their latest financial accounts, (company) bank statements or tax self-assessment.

## **Full Level 2 Definition**

Level 2 is the level of attainment which, is demonstrated by:

- the General Certificate of Secondary Education (GCSE) in five subjects, each at grade C or above, or grade 4 or above, or
- Technical Certificate at Level 2 which meets the requirements for the 2018, 2019, 2020 16 to 19 performance tables.

If a learner aged 19 to 23 has achieved a Level 2 qualification that was, at the time they started, or still is, classed as a full Level 2, then any subsequent Level 2 qualifications will be co-funded.



## Full Level 3 Definition

Full level 3 is the level of attainment which is demonstrated by a:

- General Certificate of Education at the advanced level in 2 subjects
- General Certificate of Education at the AS level in 4 subjects
- QAA Access to Higher Education (HE) Diploma at level 3
- Technical, or applied general qualification at level 3, which meets the requirements for the 16 to 19 performance tables
- Core maths at level 3

If a learner has achieved a level 3 qualification that was not classed as a full level 3 at the time they started it but has since been classed as a full level 3 and wants to enrol on any subsequent level 3 qualification, of any size, they may apply for an advanced learner loan (provided the qualification is designated for funding, and subject to learner eligibility conditions), or pay for their own learning. From the 1 April 2022 there is an exception to this rule; a learner will be fully funded under the level 3 adult offer if they meet the definition of unemployed or meet the eligibility criteria for learners in receipt of low wage.

## Advanced Learning Loans

Advanced Learning Loans will cover the cost of tuition and all costs and charges for items without which a learner cannot complete their course. Advanced Learning Loans are available for anyone who is:

- aged 19 and above at the start of the course
- studying at level 3 to level 6 in further education or training
- resident in the UK

The availability of loans at Level 3 does not replace an individual aged 19 to 23's legal entitlement to full funding for a first full Level 3. Loans may be used to fund the following types of provision regardless of the mode of study:

- A-levels and AS-levels (up to a maximum of four full A-levels)
- Quality Assurance Agency (QAA) Access to Higher Education Diplomas.
- Vocational qualifications including technical and professional qualifications at Levels 3, 4, 5 and 6

## E-Learning

Funding is available for eligible learners and the courses are free to complete. You will be asked to provide evidence of declared benefits.

## Community Learning

The purpose of Community Learning is to develop the skills, confidence, motivation and resilience of adults of different ages and backgrounds in order to:

- improve their health and well-being, including mental health and/or
- progress towards formal learning or employment, and/or
- develop stronger communities.

- tackle social, economic and digital isolation

The hourly charge for Community Learning STEM and Health and Wellbeing courses will be free and Creative skills and Languages will be £6.00 per hour.

The following provision within Community Learning will be exempt from fees:

- Customised Provision for Learners with Learning Difficulties and/or Disabilities (LLDD)
- Discrete Courses for Volunteers
- Employability courses
- English and maths

### **Pound Plus**

OCSW operates a fair and transparent community learning local fee remission policy that requires individuals to pay a course fee, but which also sets out clear eligibility criteria for those individuals who, due to their circumstances, qualify for either partial or total fee remission. The 'Pound Plus' and local fee remissions sets out how we will invest fee income and provide savings for the people who most need, and can least afford, community learning provision. Pound Plus – the 'Pound' represents the public pound, the 'Plus' is everything else that is generated in addition to the community learning funding allocation, such as fee income. All Pound Plus savings and income is used to help deliver PCC/OCSW's Strategic Plan and Community Learning Objectives. These objectives include planning and commissioning learning that can:

- focus on people who are disadvantaged and least likely to participate
- offer more provision in the local community
- extend and widen provision at no cost to those unable to pay
- support progression on to further learning and work
- support key skills around literacy, numeracy, language and digital skills
- contribute to family learning, health and social well-being
- develop stronger and more engaged communities
- develop new courses and curriculum (including a focus on pre-employment training and health/wellbeing)
- expand our outreach work to more communities and individuals
- upgrade our equipment (including mobile it resources for community venues)

### **Resits**

OCSW reserves the right to charge for resits and for non-attendance at an examination. The fees charged will be at the rate determined by the relevant awarding body.

### **Examination Fee**

Where appropriate, an Examination Fee will be payable for a learner to undertake an examination or assessment to enable the completion of any qualification. An Examination Fee will not be payable where a learner is fully funded by the ESFA.

## Refund of Fees

**Refunds are not generally given.** However, fees may be refundable, on application, in specific circumstances.

Before the course starts:

- A full refund will be made when a course does not start and is cancelled by the Service. The Service will not be liable for any claims or losses that you may suffer from the cancellation of a course.
- Should you change your mind and wish to withdraw before the course begins a full refund WILL NOT be given. There will be a charge of £10.00 for administration costs which will be deducted from the fee you paid, and a refund of the difference made to you.
- If the content of the course is materially altered from that which you enrolled for or is held at different dates or times to that advertised and, in either case, you decide you do not wish to attend, a full refund will be given.

After the course has started:

- Once a course begins, should you wish to transfer from one course to another, there will be a charge of £10.00 for administration, plus any additional course fees.
- Once a course begins and your tutor recommends that you transfer to another course and you decide to transfer, there will be no administration charge, but you will be required to pay any additional course fees. If you are unable to attend the new course suggested by your tutor or decide not to transfer, you will be withdrawn from the course and a full refund will be given to you. If you attend the new course and then change your mind no refund will be given.
- A full refund of the exam/accreditation fee and a pro rata refund of the tuition and material fee when a course has started but is subsequently closed by the OCSW. OCSW will not be liable for any claims or losses that you may suffer from the early termination of a course.

## Learner Support Funds

Learners aged 19 or over and facing financial hardship could get Learner Support.

How much you get depends on your circumstances.

The money can help pay for things like:

- travel
- course materials and equipment
- childcare - if you qualify
- Loan digital device and mobile data

For more information, please speak to a Learning Advisor.