REFUND POLICY (COURSE FEES)

Introduction

1. Sheldrake Training Limited understands that on occasion, learners may be unable to attend courses, are deemed unsuitable, decide the course is incorrect for them or the course is cancelled due to lack of numbers. In these instances, they may be entitled to a refund. This document sets out how a refund will be processed, to ensure that refunds are made in a timely and accurate manner and that the correct administration is completed and an appropriate fee is deducted.

Withdrawing from a course

2. Should a learner decide to withdraw from a learning programme, they should inform the tutor or course manager at the very earliest opportunity.

   a. If they are enrolled on a short course (five days or less) and teaching has already begun a refund will only be given in exceptional circumstances e.g. (injury, compassionate). The tutor should contact the programme manager and the Finance Manager to confirm if a refund can be given.

   b. Pre-booked courses - there will be a cooling off period of 48hrs for the learner to cancel their booking. For cancellations made within five days of a course start date fees may be made to cover any costs incurred. In this instance learners may be able to book onto a different course with no additional learning cost, although registration fees might apply.

3. If the learner has a payment plan, they cannot start the course until a minimum of registration costs have been met. In general courses should be paid in full prior to the start date.

Considerations before making a refund

4. Refunds are given at the discretion of the programme manager however the following things should be considered before recommending a refund: -

   a. Have any costs been incurred by Sheldrake Training?

   b. Is the learner unable to attend due to a significant change in workplace commitments, for compassionate or other reasons?

   c. Can Sheldrake Training offer alternative course dates?

   d. Will an administrative charge need to be raised? (This would normally be less than 10% of the full course fee)?

5, The tutor/administrator dealing with the learner should ensure that a refund form is completed (Annex B), signed by the programme manager and the reasons for withdrawal included. The original payment slip should be attached. The fee to be charged must be confirmed on Annex B. The programme manager must authorise the refund and pass it to the Finance Manager.

6. Only the main administrator or Finance Manager can process the refunds.

7. If no expense has been incurred the programme manager can decide to waive other charges. It is recommended that if cancellation restricts others from attending a course a minimum charge of £20 or 10% of the course fee should be charged. Flexibility is given to the programme manager to decide on the appropriate level of course fee. Refunds will be made by card or alternatively, by cheque.

8. This policy to be reviewed and amended annually or whenever it changes, if sooner.

Annexes:

A. Finance Refund Procedures.
B. Course Fee Refund Application Form.

Version Control	
Policy Title:	Refund Policy (Course Fees)
Version Number:	1.1
Originator:	N/A
Approved	Training Director
Date Approved:	9 May 2025
Review Interval:	Annually
Review Date:	June 2026

Annex A
to Sheldrake Training
Refund Policy Course
Fees

FINANCE REFUND PROCEDURES

1. The relevant apprenticeship Programme Manager will forward a fully completed Finance Manager Course Fee Refund form at Annex B for all requests for a refund.

2. They must attach a copy of the original BACS payment to be refunded against.

3. An admin fee may be deducted at the discretion of the Programme Manager or Head of Finance.

5. No admin fee is payable if the cancellation is by Sheldrake Training, due to compassionate reasons, significant changes in the workplace, or a soldier is posted. However, proof of requirement may be requested especially for long courses or those for which ELCAS was used for funding.

5. The refund can only be performed by the Finance Manager.

6. On receipt of the correct refund form the refund will be made on the ‘Card Save’ system less any admin charge.

7. The payment can only be up to the value initially paid. If multiple payments are made, they must all be cancelled individually.

8. Once the refund has been processed, the receipt will be emailed to the learner, administrator and programme manager and a copy attached to the paperwork and filed with proof of the learner fees.

Annex B
to Sheldrake Training
Refund Policy Course
Fees

COURSE FEE REFUND – APPLICATION FORM

Learner Name:			
Course Title:			
RALC/Location:			
Original amount paid:	**£**	Date of refund request:	
Is this part of a payment plan?	**Y* / N**	Staff initiating the refund:	

REASON FOR REFUND:

	Tick as applicable		Tick as applicable
Within 48hrs of original payment (cooling off period)		Cancellation outside 5 days of a course start date	
Course cancelled		Cancellation within 5 days of start**	
Cashback incentive		Other(Specify) :	
Admin /registration fee deducted	£	**Amount to be refunded**	**£**

Confirmation of refund request (tutor/trainer signature)	Name:	Date:	
Programme Manager authorisation	Name:	Date:	

Documents attached: Original payment detail

*strike through not applicable. All payment plan details attached if applicable
**Normally no refund, justification provided by PM

SUMMARY ACCOUNTS USE ONLY

Date of refund	*Course*	*Reason for refund confirmed*	*Amount*
			£

Refund Processed by _____ Date _____