

# Policy Guideline - Cancellations & Refunds

## Introduction

Bayside U3A recognises that there are certain circumstances when a member is entitled to apply for a refund of their membership and/or fees for social functions or events.

## Purpose

To ensure clear guidelines are in place under so members understand when they may apply for their membership and/or fees for social events to be refunded.

## Policy

### *Membership Fees*

1. Bayside U3A membership fees will only be refunded in full, on application from a member, to the Treasurer of Bayside U3A in the circumstances where the member:
  - Has a place in only one class which Bayside U3A cancels before commencement
  - Withdraws from all courses prior to the commencement of the member's classes.
  - Advises the Bayside U3A office, after the first class, that the content of the course they have enrolled in does not meet their expectations, if that is their only class
  - Has to withdraw within one month of the commencement of the Bayside U3A class for personal or family circumstances or other extenuating circumstances. These will be considered on a case-by-case basis.
  - Is unable or unlikely to secure a place in any class or activity, or
  - Prior to class commencement, is refused class participation or suspended by the Committee of Management
2. The Treasurer is delegated to make full refunds where members inadvertently overpay

### *Social Functions or Events*

1. The prior approval of the Committee of Management is required where an entrance or participation fee is to be charged.
2. Upfront fees paid for social functions, excursions and other events incurring advance payments will **not** be refunded to members unless on the discretion of the Treasurer and in agreement with the Committee of Management.

## Procedures

1. A member who feels he/she is entitled to a full refund of membership fees will contact the Office Manager.
2. The member will complete the membership reimbursement form.
3. The Office Manager will forward the form to the Treasurer who will table it at the next Committee of Management meeting for approval by the Committee.

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4. Once approval for the refund is given by the Committee of Management, the Treasurer will advise the member accordingly.
5. The Office Manager will notify the Treasurer of any applications for refunds for social functions or events.
6. The Treasurer will determine whether a refund should be made and notify the Committee of Management for approval.

## Responsibilities

1. Bayside U3A's Committee of Management is responsible for developing, implementing, reviewing and publishing this policy.
2. Bayside U3A's Committee of Management is responsible for investigating and resolving any complaint made about a breach of this policy.
2. The Bayside U3A Office Manager is responsible for receiving and managing initial enquiries about refunds for membership fees and/or refunds for fees for social functions and events.
3. Bayside U3A's Treasurer is responsible for receiving and responding to enquiries about refunds for memberships, social functions or events fees.
4. The Treasurer is responsible for bringing the matter before the Committee of Management for ratification.

## Related Policy Guidelines

Risk Management  
Class management