

Refund Policy

Introduction

U3A Wonthaggi Inc is a not-for-profit organisation incorporated in Victoria and registered at Consumer Affairs Victoria; our members are retired or semi-retired and aged 50 and over. Members' subscriptions are our primary source of income. Additional funding comes from fundraising activities and grants.

Policy

PURPOSES

1. The purposes of this policy are to set down the criteria for providing a refund to a member for:
 - the cost of a particular event when U3A Wonthaggi cancelled the event, or the member chooses to cancel his/her involvement
 - the annual membership subscription, where requested by a member
 - a fee applied to a course or activity as agreed and levied by the committee and paid by members attending that course or activity.
2. U3A Wonthaggi's committee may review individual requests for a refund that fall outside the criteria specified in this policy statement.

REFUND OF ANNUAL MEMBERSHIP SUBSCRIPTION

3. U3A Wonthaggi's membership subscription:
 - applies to a specific calendar year
 - is reviewed and determined by the committee before the start of each calendar year
 - is kept as low as possible to make membership affordable for as many people as possible.
4. Members must have paid the membership subscription to be eligible to attend classes and activities.
5. A refund of the annual membership subscription will be viewed favourably where the member:
 - became ill and unable to participate in classes for most of the year
 - enrolled in classes that were cancelled, over-subscribed or otherwise unavailable, and the member chose not to enrol in any other course or activity during that year.

SPECIAL EVENTS

6. Special events include excursions, trips and social occasions ("event/s") where a fee is collected from members in advance of the event.
7. Where members have enrolled to attend an event and paid part/all of the event's cost, a refund will be provided if U3A Wonthaggi cancels the event for any reason. In these circumstances, members will not need to apply for a refund.
8. If a member chooses to cancel their enrolment in an event in sufficient time that U3A Wonthaggi will not incur any costs due to the member's cancellation, a refund will be provided.
9. If a member withdraws from an event after the cut-off date, he/she will lose their payment unless another person agrees to replace them. In cases of severe illness or other hardship, U3A may waive this requirement.
10. For ticketed special events such as group theatre parties, no refund will be made once a ticket has been purchased with that member's payment.

11. U3A Wonthaggi reserves the right to cancel any event for reasons such as adverse weather conditions, insufficient support by members or for any other reason within its discretion. In these circumstances, fees will be refunded.

COURSE LEVY

12. Course fees are occasionally levied to help cover larger than usual operating costs due to the nature of the venue, equipment or materials required to deliver the course.
13. Course fees are usually payable on a term basis; additional course fees are detailed in the program included on U3A Wonthaggi's website.
14. Refunds of course fees will be favourably received where severe illness or other hardship has prevented a member from attending all or part of a course for which the member paid a levy.

Procedures

Where a member seeks a refund, and unless stated otherwise, the request must be made in writing and—

- (a) delivered to U3A Wonthaggi's Secretary; and
- (b) include reasons in support of the requested refund; and
- (c) include the member's name, address, telephone number.

Where U3A Wonthaggi cancels a trip or event:

- no application for a refund will be required
- the Program Manager will close the trip or event in the *U-MAS for Members* database to ensure no further enrolments are possible and notify the Treasurer
- the organiser will inform enrolled members of the cancellation
- the Treasurer will process the refunds.

Responsibilities

U3A Wonthaggi's Secretary is responsible for:

- (a) receiving and responding to any enquiries about this policy
- (b) placing any application before the first available committee meeting
- (c) bringing a complaint before the committee for investigation and resolution¹.

U3A Wonthaggi's committee is responsible for:

- (a) developing, adopting, implementing, publishing and reviewing this policy
- (b) refunding member subscriptions and other costs as described in this policy
- (c) investigating complaints about the scope or operation of this policy
- (d) monitoring and revising this policy at least annually and whenever the need arises.

Authorisation

The committee adopted U3A Wonthaggi's Refund Policy V1.0 on 14 April 2021.

Publication: U3A Wonthaggi's Committee will publish this policy on its website within seven days of the date of authorisation.

Review Deadline: 30 April 2022

Version No: V1.0 (draft 19 March 2021)

¹ Grievance procedures are laid down in the *Associations Incorporation Reform Act 2012* and in U3A Wonthaggi's constitution (also known as the Rules of Association). Our constitution can be downloaded from our website – see the “About Us” tab; a printed copy is pinned to the notice board in each classroom.