



**HEALESVILLE**  
UNIVERSITY OF THE THIRD AGE

## **REFUND POLICY**

### **Introduction**

U3AHealesville Inc. is a voluntary not for profit organisation. Its members are retired or semi-retired and aged 50 plus. U3AHealesville Inc. is able to function because of the volunteer Course Leaders and organizers.

### **Purpose**

The main purpose of this policy is to detail the criteria for providing a refund to a member for the payment of a trip or event when the trip or event has been cancelled or the member chooses to cancel. It applies to only those situations where the monies have been paid into a U3AHealesville Account

This policy will also cover the criteria for a refund of the annual membership subscription if requested by a member.

### **Policy**

If a member has enrolled in a trip or event and paid part or all of the cost of the trip or event into a U3AHealesville account, a refund of all monies paid will be provided to the member if the trip or event is cancelled by U3AHealesville Inc. for any reason.

If for any reason, a member chooses to cancel their enrolment in any trip or event where the monies were paid into a U3AHealesville account prior to the deemed cut off date, a full refund of monies paid will be provided to the member.

If a member wishes to withdraw from the event after the cut-off date, the member will lose their payment unless there is someone else who can replace them. Individual cases may be reviewed by both the leader/organizer and U3AHealesville Secretary for discussion.

A refund of the U3AHealesville Inc. annual membership subscription can be provided only under the conditions listed below and as approved by the Secretary.

- A refund of the annual membership subscription can be provided if the member passes away prior to the commencement of the year in which they have enrolled in.
- A refund of the annual membership subscription can be provided if the member becomes ill and is unable to attend any classes in the year in which they enrolled.
- If all of the classes a member has enrolled in are either cancelled or unavailable and the member is not enrolled in any other classes, a refund will be provided if the member requests it.

## Procedures

1. If a trip or event is cancelled by U3AHealesville Inc., the Course Leader will close the trip or event to ensure no further enrolments to that trip or event are possible and notify the Treasurer before contacting affected members.
2. The members who have enrolled in the trip or event will be notified by the Course Leader as soon as possible.
3. The members will be asked to nominate their preferred refund payment option. If the preferred option is via bank transfer, banking details will be requested to be provided to the Treasurer.
4. Member details and preferred refund payment option, including bank details if applicable, will be provided to the Treasurer.
5. The Treasurer will process the refund either by completing a bank transfer or arranging for the amount of cash to be left in an envelope for the member to collect from the office.

If a member notifies the Course Leader that they no longer wish to attend a trip or event prior to the date of the trip or event, the above refund process will apply.

The above refund process will apply to the refund of U3AHealesville Inc. annual membership subscription providing the relevant policy terms have been met.

## Responsibilities

- U3AHealesville Inc.'s Committee of Management is responsible for developing, adopting, implementing and publishing this policy
- U3AHealesville's Secretary is responsible for:
  - receiving enquiries about this policy and complaints about potential breaches of this policy; and,
  - for bringing a complaint before the Committee of Management for investigation and resolution, and
  - approving refunds beyond the scope of this Policy
- U3AHealesville Inc.'s Treasurer is responsible for:
  - Processing refunds by either providing cash or completing a bank transfer to their nominated bank account.
- U3AHealesville Inc.'s Course Leaders are responsible for:
  - Advising members enrolled in trips or events that the trip or event has been cancelled.
  - Requesting refund payment option information from the member
  - Notifying the Treasurer of payment option information
  - Passing on a refund to the member, as received from the Treasurer
  - If the Course Leader is unavailable the Secretary can be contacted.

## Authorisation

This Policy was adopted by the Committee of Management of U3AHealesville Inc., and minuted on 17 November 2021. This policy will be published by the Committee of Management of U3AHealesville Inc. on its website within 4 weeks of the date of this authorisation.