Policy – Refunds

Introduction

Whittlesea U3A Inc. is a voluntary not for profit organisation. Its members are retired or semi-retired and aged 50 plus. Whittlesea U3A Inc. is able to function because of the volunteer tutors 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.

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, a refund of all monies paid will be provided to the member if the trip or event is cancelled by Whittlesea U3A Inc. for any reason.

If for any reason, a member chooses to cancel their enrolment in any trip or event, a full refund of monies paid will be provided to the member prior to the date of the scheduled trip or event subject to conditions as outlined in that particular event e.g. cut off dates etc.

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 Whittlesea Inc. Secretary for discussion.

A refund of the Whittlesea U3A Inc. annual membership subscription can be provided only under the conditions listed below and as approved by the Secretary, President and/or Committee of Management.

- 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 Whittlesea U3A, the Class Coordinator will close the trip or event to ensure no further enrolments to that trip or event is possible and notify the Treasurer before contacting affected members.
2. The members who have enrolled in the trip or event will be notified by one of the office staff 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 one of the office staff 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 subject to conditions as listed above.

The above refund process will apply to the refund of Whittlesea U3A Inc. annual membership subscription providing the relevant policy terms have been met.

Responsibilities

- Whittlesea U3A Inc.'s Committee of Management is responsible for:
  - developing, adopting, implementing and publishing this policy

- Whittlesea U3A Inc.'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
  - approving refunds beyond the scope of this Policy

- Whittlesea U3A Inc.'s Treasurer is responsible for:
  - Processing refunds by either providing cash or a cheque to the member, or completing a bank transfer to their nominated bank account.

- Whittlesea U3A Inc.'s Class coordinator is responsible for:
  - Updating the class list to reflect any trip or event that has been cancelled.
  - Notifying the Treasurer and Office staff of any trip or event that has been cancelled.

Authorisation

This Policy was reviewed by the Committee of Management of Whittlesea U3A Inc., and minuted as such, on the 11th of May 2026.

This policy will be published by the Committee of Management of Whittlesea U3A Inc. on its website within 4 weeks of the date of this authorisation.

Policy Review

This Policy will be reviewed at least annually or as circumstances change.

Related documents

Follow the link for the Reimbursement of Expenses form found on the Whittlesea U3A website under Tutor Area: Click Here