

Member Fees, Charges and Refunds Policy

PURPOSE: To advise members of the fees, charges and refunds associated with membership.

POLICY:

1. Some aspects of this Policy are set out in the Casey U3A Inc. Constitution and Rules. Where this is the case, a Rule reference is quoted. All other aspects have been approved by the Committee of Management (Rule 47).

Membership Fees

2. Annual membership fees are determined by the Committee of Management (CoM) and advised to members at the AGM [Rule 12(1)]. Prior to the AGM, membership fees are developed and approved by the CoM as part of the annual Budget process.
3. Fees are based on the calendar year, effective from 1st January to 31st December.
4. The CoM may determine whether new members who join after the start of the calendar year:
 - (a) pay a full membership fee; or
 - (b) an amount determined by the CoM [Rule 12(3)(a) and (b)].
5. Discount membership fees are not offered for the spouse or partner of a member.
6. Annual membership entitles a financial member to attend courses run by Casey U3A Inc. Additional charges may apply to some courses.

Joining Fees

7. No joining fees are charged, although the Constitution & Rules does allow for these. [Rule 9 (2) Note 1].

Honorary Membership

8. The CoM determines whether Honorary Membership will be offered [Rule 15].
9. In recognition of their contribution to the organisation, the annual membership fee is waived. Honorary status is only for the calendar year(s) decided by the CoM. Honorary members shall not be eligible to hold office or vote at any General Meeting.

Life Membership

10. The CoM determines whether Life Membership is offered [(Rule 16)].
11. In recognition of their contribution these members have made to the organisation, their annual membership fees are waived. Life Members have the same rights and responsibilities as Members [Rule 16].

Associate Membership

12. If this class of membership is offered (Rule 14), the CoM determines the Associate Membership fee. They are ineligible to vote or stand for office [Rule 14(1) and (2)].

Membership Refunds

13. No refunds will be made if a member has participated in more than three sessions of a class or activity, even if it is the only class/activity they are enrolled in.
14. All requests for membership refunds must be in writing and sent to the Course Coordinator.
15. The Course Coordinator is delegated to approve full refunds, and notify the Treasurer for payment, where the member:
 - (a) has a place in only one class which Casey U3A Inc. cancels before commencement;
 - (b) encounters personal or family circumstances whereby they are unable to commence classes;
 - (c) is unable or unlikely to secure a place in any class or activity; and/or
 - (d) prior to class commencement, is refused class participation or suspended by the CoM.
16. The Treasurer is delegated to make full refunds where members inadvertently overpay.

Social Functions and Events

17. The prior approval of the CoM is required where an entrance or participation fee is to be charged.
18. Other than non-refundable charges made by outside organisations, members who are unable to participate may be given a refund authorised by Course Coordinator.

Refund Procedure

1. The member(s) will be asked to nominate their preferred refund option of bank transfer or cash. If the preferred option is via bank transfer, banking details will be requested to be provided to the Treasurer.
2. Member details and preferred refund payment, including bank details if applicable, will be provided to the Treasurer.
3. 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.

Authorisation

This Member Fees, Charges and Refund Policy was reviewed and adopted by the Casey U3A Inc. Committee of Management meeting and minuted as such, on 19th March, 2025.

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

Policy Review

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

Related Documents/Policies

- Casey U3A Inc. 2024 Constitution & Rules.