

Event Guidelines and Refunds Policy

Introduction

This document is a reference for Club Members planning events and trips that require prior bookings and payments to organisations providing services for the trips.

If prior bookings are required and there are limits on numbers of attendees, either minimum or maximum, then the Trips and Events Register should be used to keep track of bookings.

These guidelines also apply to events where bookings are not required and payment is made directly to the provider. The Trips and Events Register must be used to keep track of bookings and attendees for insurance purposes.

Proposing Events

When a suitable event or function in which Club groups may wish to participate is identified, and bookings need to be made and/or funds need to be collected, the event will be regarded as a “major event”. If this is the case, then the organiser must notify the Activity Coordinator (AC) who will note the event dates and hand them the Club’s events documentation. This is to be completed and returned to the AC who will refer it to The Committee for consideration prior to any commitments being made.

The documents are available from the AC or Club Secretary.

- When the AC has been advised that the committee has approved the event, the event leader can then complete a “Trips and Events Register” (available from the AC), for the event. The register has a list of member’s names and three columns to be used to keep track of members who have booked, paid and those who attended.
- The columns on the Register: are “B” to tick when a member wishes to book for the event, “P” to tick when the full amount has been paid after a receipt has been issued and the column “A” to be used on the event day to keep track of who has attended.
- This cross-reference will then be used by the event organisers to manage the bookings and determine when there are enough names to justify the event going ahead.
- Any non members’ names are to be written on the blank page on the back of the register with the same details.
- Meanwhile, the event will be listed in the newsletter and on the planning boards seeking participants. When it is determined that there are sufficient numbers for the event to proceed, the event leader will then advise the AC and Newsletter editor to let the members know when payment is due.
- After the event, the organiser should pass the completed Trips and Events Register to the AC to hold as a record of who attended the event.
- In the event of an activity needing urgent approval, give the Event Activity Form to the AC before 9.00 am on the morning of a Club meeting so the activity can be assessed and immediate approval be granted. This would apply to an activity occurring prior to the next monthly Club meeting
- Every activity must be approved by the AC and one other Committee member
- Only recognized Probus tours and activities recommended to and approved by the Committee of Management for Probus Members and guests will be covered by Probus Insurance.

Making Event Bookings

- When organizing an event, event leaders must ascertain from the event operator, the highest booking price per person. This is normally the charge for a minimum number of people. For example, 30 rather than a full busload of say 45 people. This maximum price is to be the price advertised and charged to members for the event. Excess funds will be held by the Treasurer for future Club use. This rule may be waived for larger more expensive trips on the approval of the committee.

Advanced Bookings

- No advance bookings to vendors are to be confirmed unless the minimum number of bookings specified for the trip have been received and fully paid for.

Members' Priority

- Once it has been decided that there are enough people, the final date for payment will be announced in the next newsletter and at the following Club meeting with payment being due BEFORE the meeting following that.
- Payment in FULL will normally be required. Deposits will not be accepted unless an arrangement for this for all participants has been made.
- When payment is received for an event, the date on the receipt will be used to prioritise a list for the inclusion of non-member partners and friends should members not make up numbers (see below).
- Members may nominate ONE non-member partner or friend to accompany them to an event. If paid-up members do not fill the required number, non-member partners or friends may be included.
- If there are more applicants than vacancies, then date of payment will decide priority or, if necessary, a ballot will decide selection

In summary, events will be filled in the following priority:

- Paid up members get first priority
- Should the maximum number NOT be filled by members, nominated non-member partner or friend will be included with date of payment providing priority.
- Should members and nominated non-member partner or friend NOT fill the maximum number STILL, additional friends may be included.
- Should the maximum number STILL NOT be filled by members, nominated non-member partner or friends, the event may be advertised to other local Probus Clubs.

Note that once non-members have paid for events, their booking is firm and cannot be cancelled in favour of a member's subsequent request for a booking.

Payment for Activities

- Payment for activities can be made by cheque or cash.
- All cheques for payment for trips, luncheons, theatres etc should be made payable to: -PROBUS CLUB OF TEMPLESTOWE VALLEY Inc.
- All cash and cheques should be checked in the presence of the member paying and a receipt issued immediately.
- Activities should be paid for in full, unless the cost is \$200 or greater in which case deposits may be accepted, however, full payment should be encouraged.
- Surplus money from any activity should be carried forward and shown in our records.

Handling of Funds

- After reconciliation of the funds, the event leader should place all cheques and cash gathered that day, for each event in the brown envelopes provided by the Treasurer for that purpose.
- All details on the envelopes are to be completed by the event leader. The envelope must then be passed to the Treasurer to be deposited in the club's bank account.
- The Treasurer will check and confirm the contents of each envelope in the presence of the responsible event leader.
- When booking and paying the vendor for events, an invoice and receipt should be requested and passed to the Treasurer with the funds.

Note: Event leaders should not take cheques or cash home, as these funds are not insured by Probus. They are only insured by Probus when the Treasurer receives them and then only for a period of two days. Also, event leaders are instructed not to draw cheques for payment for any activity from their personal chequebooks or use their credit card for that purpose

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Handling of Funds (Continued)

- The Treasurer must deposit all cash and cheques for payment for an event in the Club's bank account.
- The Treasurer will not draw any cheques for an event until the required amount of money has been deposited and cleared in the Club's bank account .
- When all funds for a specific event have been deposited and cleared, the events leader must complete a payment request form and hand this to the Treasurer who will draw a cheque from the Club's bank account pay for that event. to be available before the due date.

Activity Cancellation

If an activity is cancelled, an amount of money has been paid and a Member cannot be contacted, the organizer of the event is to contact the Welfare Officer, check the apology list then take appropriate action.

- Day Tours Activities.

In the event of cancellation, Probus members/guests need to provide one weeks notice when seeking a refund. Refund qualifications may vary depending on monies paid and commitments given to bookings and third parties. A full refund may not be possible in certain circumstances for example, coach bookings.

- Extended Tours.

In the event of cancellation Probus members/guests need to provide twentyeight days notice when seeking a refund. Refund qualifications may vary depending on monies paid and commitments given to bookings with third parties. A full refund may not be possible in certain circumstances for example, motel, flight and coach bookings.

Cancellation of a Probus Activity Due to Weather Conditions

If the weather bureau forecast is for 35 degrees Celcius or above, members should contact the leader to confirm the activity. If the activity goes ahead this will be classified as a Probus activity. On a Total Fire Ban Day, no BBQ will be available for cooking

Member's Cancellation

If a member or non member has paid for an event but has to cancel, their place can be offered to others but they will need to arrange cross-payment between themselves. They may alternatively request a refund from the event operator. The Club event leader may help obtain a refund but the Club has no responsibility if this is not granted. A refund will not be made from Club funds unless special circumstances such as death, illness or hardship have necessitated the cancellation. These exceptions must be referred to the committee in writing through the Welfare Officer from the person affected or their representative, for specific approval of a refund and if approved by the committee will be paid for from excess funds.

Probus Non-Member Visitor Financial Protocol

Probus South Pacific Ltd. (PSPL) has instructed our Probus Club of Templestowe Valley (PCTV) to pay them a non-member visitor fee for all non-member visitors who attend a Probus meeting and or approved activity more than three times in any Club financial year. This annual visitor fee for the PCTV is \$20.00. This fee is to cover the PSPL capitation fee plus a minimal amount for Club overheads and also provides for the insurance cover for visitors without imposing extra costs on full Probus members whose insurance premiums are included in their Membership fees.

The Membership Officer will keep a Register of all attending visitors.

Activity Leaders are to complete the Visitor Attendance Sheet and forward the information to the Membership Officer following each attendance by a visitor. These details will be added to the Visitor Register.

Following three attendances by a particular visitor across all our meetings and or activities, the Treasurer is to be informed. The Treasurer will then issue an invoice to each visitor and upon receiving the remittance will then issue a receipt acknowledging payment and the legitimate status of the visitor for the TVPC financial year.

The Club financial year is from February 1st to January 31st of the following year.

In conclusion dictated as we are by our PSPL obligations, our Activity Leader Club Visitor protocol is as follows:

1. As Leader of your Club Activity your role is to advise all visitors who attend your activity on their first visit of their obligation to pay the \$20.00 annual fee should they intend attending and indeed do attend more than three times.
2. Forward this information by e-mail, following each Activity, to the Membership Officer.