

# CORPORATE POLICY



Policy Title: **Program Withdrawal Policy**  
Policy Category: **Municipal Services**  
Policy No.: M-005  
Department: Community Services  
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Related Documents/Legislation:  
Key Word(s): refund, program transfer, credit

## **POLICY STATEMENT:**

The Community Services Department requires a fair and consistent policy to manage individual and team program withdrawals.

## **PURPOSE:**

The Program Withdrawal Policy provides consistent, department-wide guidance for issuing program registration refunds, credits and/or transfers.

## **DEFINITIONS:**

Community Services Customer Account – is an ongoing record of financial transactions made by a specific customer and/or family.

Drop-in Admission – the fee paid for one time access to a program.

Program Credit – the value of the amount owing to a customer after withdrawing from a program that can be applied towards future transactions on the same CS customer account.

Program Registration – the process of reserving and paying for a space in a recreation and leisure program or league offered by the City of Waterloo.

**Mandatory Policy, *Municipal Act* :** No  
**Policy Administration Team, Review Date:** March 4, 2013  
**Corporate Management Team, Review Date:** June 19, 2013

Program Refund – the repayment of program purchases to a customer less any applicable administrative fees.

Program Session - selected programs that are available in specific timeframes throughout the year, often: fall, winter, spring or summer.

Program Transfer – a change from the original program to an alternate program.

Registered Programs – instructor-led recreation or leisure activities that require advance registration, have limited enrolment, and a defined start and end date.

Withdrawal – to remove from participation in an activity.

**SCOPE:**

The Program Withdrawal Policy applies to all Community Services programs and leagues.

**POLICY COMMUNICATION:**

This policy will be communicated by means of:

- Posting on the City of Waterloo website
- Posting on the City of Waterloo intranet accessible by staff
- Community Services Program and Activities Guides

**POLICY:**

- A. Program Cancellations:
  1. Full or prorated refunds and/or credits will be provided to all registrants in the event the City cancels a program for any reason.
- B. Drop-in admission and multiple-admission pass fees:
  1. Drop-in admission fees are non-refundable.
  2. Multiple-admission pass fee refunds will be prorated based on the full drop-in rate of a program and will be subject to a \$25 or 20% administration fee (whichever is less). Fees of \$10.00 or less are available as a program credit only.
- C. Registered Programs:  
Customer Withdrawals:
  1. Refunds and credits must be requested in person, by email or by telephone.
  2. Refunds and credits are provided if requested before the 3<sup>rd</sup> class of a multi-week program; Requests made after the 3<sup>rd</sup> class are subject to the program supervisor's discretion. A doctor's note may be required for medical reasons.

3. Program refunds are prorated and subject to a \$25 or 20% administration fee (whichever is less).
4. Program credits are prorated and not subject to an administration fee.
5. If a program is a consecutive multi-day session or camp, full refunds are available up to five business days before the program begins. Refunds requested with less than five business days notice are subject to a \$25 or 20% administration fee (whichever is less).
6. Fees of \$10.00 or less are available as a program credit only.
7. Program credits are non-transferable to another City of Waterloo customer account.
8. Program credits can be applied towards any future City of Waterloo facility rental, program registration, admission to a drop-in program or purchase of a multiple admission pass.
9. If a customer is removed from a program for contravening the Respectful Behavior Policy (currently in development), a prorated refund will be provided.

Customer Program Transfers:

1. Program transfers must occur within the same program session.
2. Program transfers are permitted if a request is made prior to the 3<sup>rd</sup> class of the original program and if space is available in an alternate program; transfer requests after the 3<sup>rd</sup> class are subject to the program supervisor's discretion.
3. If the transfer is to a higher priced program, the customer pays the difference.
4. If the transfer is to a lower priced program, the customer receives a credit on their account.
5. If space is not available for a transfer within the same session, a customer may request a refund or credit. Refunds are prorated and subject to a \$25 or 20% administration fee (whichever is less).

D. League Programs:

Leagues accommodate two forms of registration – team registrations and individual registrations. Withdrawal protocol varies based on the method of registration.

General protocol for all withdrawal requests:

1. If a team or individual cannot be accommodated, a 100% refund is provided.
2. Refunds are not provided for players or teams removed or suspended for misconduct, as outlined in League rules.

League Team Withdrawals:

1. All team withdrawals are refunded and subject to a 5% administration fee; teams do not receive a program credit.
2. Team refunds are issued to the person who registered the team. Individual members of a registered team do not receive a personal credit or refund of team fees directly from the City.

League Independent Individual Withdrawals:

1. Independent Individual Registrants may request either a program refund or a program credit.
2. All individual refund requests are reviewed by and subject to the program supervisor's discretion.
3. Refunds are pro-rated and subject to \$25 or 20% administration fee (whichever is less). Credits are pro-rated and not subject to an administration fee.

League Late Entry Requests:

1. Late entries are permitted based on availability.
2. Late entry fees for individuals are prorated and subject to a \$25 or 20% administration fee (whichever is less).
3. Late entry fees for teams are prorated and subject to a 5% administrative fee.

Un-utilized account credits will be managed as follows:

1. Account credits under \$50.00 can be left on a customer account for two years from the date of the last activity. After which, credits will be transferred directly to the Corporate Miscellaneous Revenue account.
2. Inactive account credits of \$50.00 Credits can be left on a customer account for two years from the date of the last activity. After which, refunds will be issued automatically and subject to a \$25 administration fee.