Introduction

Marshall Road State School aims to provide a caring, supportive and cooperative learning environment where all children are encouraged to become life-long learners and strive to achieve their personal best.

In order to achieve this and to promote our shared values and beliefs, the school may organise activities such as excursions, camps, sporting events, cultural programs, leadership events, workbooks etc. for students as part of the curricular/co-curricular program. These programs enhance a student’s learning by providing opportunities for the student to participate in activities, both curriculum-related and recreational, outside the normal school routine.

All planned school excursions and camps are approved by the Principal and endorsed by the Parents and Citizens Association. Participation of students in an excursion, additional activity or camp is confirmed through payment of the excursion or camp fee and provision of a permission form completed by the parent/carer.

State schools are able to charge a fee for:

- An educational service including materials and consumables not defined as instruction, administration and facilities for the education of the student;
- An education service purchased from a provider other than the school where the provider charges the school; and
- A specialised education program.

A school fee is directed to the purpose for which it is charged. However occasionally refunds may need to be issued to a student, parent or carer for one of the following reasons:

- Overpayment of an account;
- Termination of enrolment for any number of reasons;
- Cancellation of the event;
- Non-attendance at a non-compulsory excursion where no costs for that excursion have been incurred; or
- Any other reasonable reason where a refund is legitimately required.

Purpose

The purpose of this policy is to provide information to Parents and Carers in relation to the requirements and policy for issuing refunds.

Refunds may only be made in the following circumstances:

- The customer or student’s credit balance relates to an overpayment, a credit note, a refundable deposit, bond of similar transaction;
- The reason for the refund must be legitimate; and
- Refunds may be made via electronic funds transfer (preferred method), or cheque facilities if electronic funds transfer is not possible.

Guidelines

Refund payments to accounts receivable customers may only be made by the Business Services Manager at Marshall Rd State School. This is to ensure the correct processing of refund documentation and also ensure that Education Queensland policy and procedures are followed.
The following guidelines are in place in relation to issuing refunds:

- A refund cannot be made to correct an erroneous entry. Such transactions can only be undertaken through the issuing of a credit or debit note to correct the error;
- Refunds are not to be made automatically for all customers or students with a credit balance. Each refund will be made having regard to all of the relevant circumstances and individually entered into the OneSchool Finance system;
- Refunds may be offset against on-going accounts at the request of the customer; and
- Refunds must not be made where the debtor has an overdue account for another school activity.

**Refunds for Activities and Excursions**

School fees for extra-curricular activities and excursions are provided on a cost recovery only basis, according to the number of students who have indicated their attendance.

Participation of the student in an excursion or extra-curricular activity is confirmed through payment of the fee and provision of a permission form completed by the parent.

As the school budget cannot meet any shortfalls in funding for an extra-curricular/co-curricular activity due to the subsequent non-participation of a student who had previously indicated attendance of the activity, fees already paid for an extra-curricular/co-curricular activity may be refunded in full, or in part, or not at all, having regard to the associated expenses incurred and the circumstances of the non-participation. The examples below illustrate some common situations:

*Example 1:* Fifty students make a commitment to play an interschool sport, entry of the appropriate number of teams into the competition is organised by the sport coach and bus transport to the venue is booked weekly for the season. The cost of bus hire per student per week is calculated on the total hire fees for the bus equally shared among all 50 enrolled students for the ten week season. Where students fail to attend some sport fixtures, drop out of teams (for whatever reason), or opt for car transport with a parent, the liability for bus hire costs remains the same and students would not be entitled to a refund.

*Example 2:* School Camp leaders prepare a camp budget based upon the number of students who have indicated their attendance. A student pays the camp fee but does not attend and does not provide the school with sufficient notice to cancel purchases made on the student’s behalf e.g. entry fees to a local attraction, food, equipment. The refund to parents may exclude payments made in advance to third party providers.

*Example 3:* A student enters an ICAS competition run by the University of NSW. The entry fee is collected by the school on behalf of UNSW and paid in advance for the purchase of the test paper. The student is ill on the day of the test and fails to sit the test. In this circumstance, the blank test paper will be provided to the student after the security period has passed, however no refund from the school will be payable.

**Refunds for School Uniforms and books**

It is noted that purchases of ALL school uniforms, book packs and stationery items from the school uniform and book shop are made from the Marshall Rd State School School Parent’s & Citizens Association (“P & C Association”) and accordingly, it shall be at the discretion of the P & C Association to decide if a refund for a school uniform or books can be made.

**Applying for a Refund**
If a student, parent or carer wishes to apply for a refund for any of the following reasons, they may do so by completing a Request for Refund form available from the school office:

- Overpayment of an account;
- Termination of enrolment for any number of reasons;
- Non-attendance at a non-compulsory excursion where no costs for that excursion have been incurred; or
- Any other reasonable reason where a refund is legitimately required.

Where possible, the request should include the receipt relating to the payment for which a refund is being sought.

It is noted that a refund request received for non-attendance at a non-compulsory excursion or activity will be forwarded to the respective class teacher for confirmation of the following:

- What costs have been incurred for that excursion; and
- If the student is able to receive a full or part refund of the activity or excursion fee.

**Related Policy**

Department of Education and Training policy references:
- Education (General Provisions) Act 2006
- SCM-PR-002: School Excursions
- FNM-PR-019: State Education Fees

**Request for Refund Form**

See below
REQUEST FOR REFUND

I, __________________________, being the parent/carer of __________________________
in Year __________, request a refund of $________ paid for __________________________
(activity)

I request a refund due to:
________________________________________________________________________
________________________________________________________________________

I understand and agree that:

1. a refund may not be made to me or be made in full or in part, having regard to the associated expenses already incurred by the school, and the school’s refund guidelines provided to me.

2. the school receipt for the original payment is attached / not attached. (Please circle)

3. my details will be kept confidential and will not be used for any other purpose.

4. my refund, if approved, will be made:
   i. as a credit against my child’s account at the school; or
   ii. to my bank account via electronic funds transfer (EFT please complete details below);
   iii. or by cheque in the name of __________________________

__/____/ ___ (Date)  Signature of Parent/Carer __________________________

Bank Account Details:

Account Name: __________________________

BSB: ____________ Account Number: __________________________

Bank: __________________________ Branch: __________________________

(School Use Only)
Original Receipt Number: __________________________

Amount Receipted: $__________

☐ APPROVED  Refund Amount Approved: $__________

☐ NOT APPROVED

___________________________  ____/____/ ___
Signature of Principal  Date