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## School Learning Program Bookings

### Purpose

This policy sets out the confirmation and cancellation conditions (the conditions) for SLM Learning Programs for schools and the processes for communicating and enforcing those conditions.

### Background

The late cancellation of Learning Program bookings can result in significant costs to SLM, including casual and other staff costs, administration and cancellation costs, and the opportunity cost of lost business.

This policy was developed to clarify the booking conditions to the persons who make bookings on behalf of schools and SLM Programs and front of house staff who deal with the schools in the event of a cancellation.

### Scope

This policy applies to Learning Program bookings for schools, including primary and secondary schools.

## POLICY

### 1. Implementation date and transitional arrangements

This policy will apply to bookings made after the policy issue date recorded in the header.

### 2. Procedure for bookings and notification of conditions

Program bookings are made to the property where the Program is to be conducted. Generally, Visitor Service Officers (VSOs) are responsible for managing Program bookings for properties within that Portfolio under the supervision of the Visitor Services Coordinator (VSC).

The VSO will follow the steps below when establishing a Provisional Booking and confirming a booking.

Note: the responsibilities of a VSO in this Policy apply to any person that is managing a booking.

**2.1** Ordinarily the initial contact and Provisional Booking is conducted verbally over the phone. Often the booking details (like the time, date, program details, number of students etc) are worked-out over a series of conversations with a teacher or administrative staff member (the school) although this may also be established by email. The VSO will outline the booking process during these conversations. Specifically, the VSO will inform the person that:

- SLM's policy is to invoice based on the number of participants confirmed 7 days prior to booking;
- The conditions that apply to bookings, and set out in the Booking Confirmation, should be read carefully;
- That SLM implements a policy that cancellations made on short notice will incur charges up to the full value of the program; and
- Bookings will be provisional, and are not confirmed until SLM has received the school's written acceptance of the booking conditions, signed by an authorised representative (Booking Confirmation).

- 2.2** Once the Provisional Booking is established (whether verbally or otherwise), the VSO will manually enter the agreed details into the booking management systems and generate a Booking Confirmation request containing the relevant information.
- 2.3** The VSO will send the Booking Confirmation request to the school by email, requesting it be signed by an authorised representative of the school and returned to SLM.  
The email must include notification that **the booking will only be confirmed once an authorised representative has indicated the school's acceptance of the conditions by completing and returning the attached confirmation.**  
The text of the Booking Confirmation email is set out in section 5.
- 2.4** Once SLM receives the signed Booking Confirmation, the booking is a Confirmed Booking. If the school cancels a Confirmed Booking see section 3.
- 2.5** If the signed Booking Confirmation is not received by SLM 21 days prior to the booking date, the VSO will contact the school and remind them the booking has not yet been confirmed.
- 2.6** SLM retains the right to cancel a Provisional Booking if the signed Booking Confirmation has not been received 14 days prior to the booking date. Provisional Bookings are cancelled by SLM by notifying the school of the cancellation in writing, generally by email. Cancellation fees do not apply where SLM cancels a Provisional Booking.
- 2.7** The VSO will contact the school 7 days before the booking date to confirm final numbers and requirements.
- 2.8** Immediately after confirming the final numbers and requirements the VSO will advise the Customer Service Officer (CSO) who will issue the school an invoice for the full cost of the program (Invoiced Fee).

### **3. Dealing with a cancellation**

This section must be followed in the event of a cancellation of a Confirmed Booking.

#### **3.1 Applying the conditions**

Where a cancellation, or rescheduling of a booking, is made, SLM policy is to charge the cancellation fees set out in 3.3.

#### **3.2 Cancellations must be in writing**

Cancellations must be made in writing (cancellation notice). If a school attempts to give verbal notice of a booking cancellation the VSO is to advise that the cancellation can only be made in writing. Email is acceptable.

Guidance on how delays between verbal and written cancellations should be dealt with is set out in section 3.5.

#### **3.3 Cancellations fees**

- If the cancellation is made 14 days or more in advance of the booking date, no cancellation fee will be charged.
- If the cancellation is made between 7 and 13 days before the booking date, the cancellation fee will be 50% of the Invoiced Fee.
- If the cancellation is made 6 days or less before the booking date, the cancellation fee will be 100% of the Invoiced Fee.

#### **3.4 Issuing invoices for cancellation fees**

Where the VSO receives a cancellation notice that gives rise to a cancellation fee, they will inform the school they will be charged in accordance with the Booking conditions and await the school's response before asking the CSO to issue an invoice.

This is to minimise administrative work in the event the charge is disputed and if a compromise offer is made and accepted (see 4.3).

- If the school accepts the notification of the cancellation fee, the VSO should ask the CSO to immediately issue an invoice for that amount.
- If the school disputes the cancellation fee, the VSO is to follow the steps in 'section 4 'Dispute management'.

If the school has not responded to the notification of the cancellation fee after 7 days, the VSO should contact the school to discuss the issue. If the school disputes the cancellation fee, the VSO is to follow the steps in 'section 4 'Dispute management'. If

the school cannot be reached or does not reply, the VSO is to ask the CSO to issue an invoice for the cancellation fee.

### 3.5 Delays between verbal and written cancellation

In some instances there may be a delay between a school verbally notifying SLM of their intention to cancel a booking and confirming the cancellation in writing.

While generally a booking is not considered to be cancelled until SLM receives written cancellation, a verbal notice may be taken as the cancellation where SLM has avoided incurring costs (i.e. staff were able to be rescheduled) or did not lose revenue (i.e. secured another booking) as a result of the verbal cancellation.

For example, this may be appropriate:

- where notice of a verbal cancellation is received 3 weeks before the booking date but written confirmation is not received until (just) less than 2 weeks before the date, or
- a verbal cancellation is received 9 days before a booking but written confirmation is not received until 6 days before.

The decision to take verbal notice as the cancellation may be made by the VSC. Portfolio staff should contact the Coordinator Learning or Head of Programs for clarification or decision if they are unsure about how to deal with these instances.

## 4. Dispute management

### 4.1 General

From time to time a dispute may arise with a school regarding a cancellation fee. For example a school queries or objects to a notification of a cancellation fee or refuses to pay an invoice. If a dispute arises the conversation should be managed in such a way that SLM is able to maintain a positive business relationship with that school, without leaving SLM at a financial disadvantage.

### 4.2 Initial response

Where a school queries or disputes a cancellation fee, VSOs should explain that SLM has a policy of charging schools which cancel at short notice (as agreed by the school) because late cancellations represent real costs to the organisation. The VSO should explain that the costs to SLM include:

- The wages of the casual staff if the cancellation was made the day of the booking
- General staff costs in the time spent on the booking and cancellation process from first contact through to confirming final numbers, including rostering staff, and
- Loss of potential revenue from other schools not being able to book into the time slot occupied by the school that was subsequently cancelled.

### 4.3 Compromise offer

If this explanation does not resolve the dispute, the VSO should discuss the matter with the VSC. In order to prevent an escalation and show flexibility and goodwill, the VSC may decide to offer the following options for reducing the cancellation charge.

Note: Portfolio staff are not authorised to waive the cancellation fee altogether or to reduce it beyond these compromise offers.

#### 4.3.1 Options available when the school **IS NOT** rescheduling the booking

- If the cancellation is made between 7 and 13 days before the booking date, the reduced cancellation fee will be 35% of the Invoiced Fee (reduced from 50%)
- If the cancellation occurs 6 days or less before the booking date, the reduced cancellation fee may 75% of the Invoiced Fee (reduced from 100%)

#### 4.3.2 Options available when the school **IS** rescheduling the booking

- If the cancellation is made between 7 and 13 days before the booking date, the reduced cancellation fee will be 25% of the Invoiced Fee (reduced from 50%)
- If the cancellation occurs 6 days or less before the booking date, the reduced cancellation fee will be 50% of the Invoiced Fee (reduced from 100%)

To qualify for this compromise offer, the school must confirm their acceptance in writing within 7 days.

#### 4.4 Referral of disputes to Coordinator Learning and Head of Programs

If a dispute is not resolved by way of a compromise offer then the matter must be referred to the Coordinator Learning or Head of Programs for resolution.

The Head of Programs approval is required to waive a cancellation charge or reduce it beyond the compromise offers.

### 5. Confirmation, payment and cancellation conditions

The following text comprises the Confirmation, payment and cancellation conditions (the conditions), which are to be posted to the SLM website:

#### **Confirmation, payment and cancellation**

- You can alter your booking numbers up until 7 days prior to your visit.
- We will call you 7 days before your booking to confirm your final numbers and requirements, shortly after which you will be invoiced. Please note that we cannot accept changes to final numbers or amend your invoice after this time.
- Payment can be made by Credit Card, EFTPOS or cheque (payable to Sydney Living Museums). EFT details will appear on the invoice. The postal address for cheques is: The Mint, 10 Macquarie Street, Sydney NSW 2000.
- A Credit Card Authorisation Form is available to download at:  
<http://sydneylivingmuseums.com.au/sites/default/files/Credit%20Card%20Authrisation%20Form.pdf>
- Cancellations made within 7 days of a booking will incur a cancellation fee equivalent to the full cost for the program based on your confirmed numbers.
- Cancellations made within 2 weeks of a booking will be invoiced for 50% of the total program fee quoted in this letter.
- Cancellations must be made in writing.

To confirm your booking please indicate your acceptance of these conditions by completing the information below and returning this letter via email or fax within 7 days of receipt.

I am authorised to accept the conditions listed above on behalf of

Name of school: \_\_\_\_\_

Name: \_\_\_\_\_

Position: \_\_\_\_\_

Signature: \_\_\_\_\_

### **Roles and responsibilities**

- Executive Director: Approves the Policy.
- Head of Programs: Responsible for overseeing the policy and ensuring that staff communicate and enforce the conditions; promotes the policy to relevant staff members; responsible for making decisions to charge cancellation fees and is authorised to waive a cancellation fee or reduce it beyond the compromise offers; responsible for resolving disputes.
- Coordinator Learning: Assists the Head of Programs in overseeing the policy and ensuring that staff communicate and enforce the conditions; promotes the policy to relevant staff members; responsible for making decisions to charge cancellation fees; responsible for resolving disputes.
- Customer Service Officer (CSO): responsible for invoicing schools.
- Visitor Services Officer (VSO): responsible for managing bookings and ensuring that cancellation fees are charged to schools in accordance with this policy. This includes: following the steps in section 2 regarding the management of a booking and notifying schools of the conditions; dealing with a cancellation and invoicing schools the applicable cancellation charge as set out in section 3;

and discussing the suitability of making compromise offers with the VSC and assists in dispute management under the direction of the VSC as set out in section 4.

- Visitor Services Coordinator: directs, oversees and assists the VSO's management of bookings, imposition of cancellation fees and dispute management; decides whether a compromise offer should be made to a school; refers unresolved disputes to the Coordinator Learning or Head of Programs.

### **Delegations**

- VSCs are delegated the authority to make compromise offers to reduce the applicable cancellation fee in accordance with section 4.3 of this policy.

### **Legislation**

- None

### **Related policies**

- None

### **Other related documents**

- None

### **Definitions**

- None

### **Superseded documents**

- None

### **Revision history**

<b>Version</b>	<b>Date issued</b>	<b>Notes</b>	<b>By</b>
1	15/04/2015	Policy Drafted	Policy & Compliance Officer

### **Review date**

This policy will be reviewed every three years. The next review date will be 14/04/2018.

### **Contact**

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