

IAESDP INTERIM ACCESS PROGRAMS

Policy, Implementation Guide, and Public-Facing Copy

Participant Access Awards and Economic Access Fee Waivers



Important: This document provides governance and policy-development guidance. It is not a substitute for advice from IAESDP's nonprofit tax counsel, credentialing counsel, accountant, or auditor. Further, this document is subject to periodic review and updates without notification. Please read the policy in full.

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How to use this package

Part I governs participant-directed awards for education delivered by outside providers. Part II governs reductions or waivers of IAESDP-controlled membership and credentialing fees. These mechanisms must remain distinct in policy, accounting, public communications, and decision-making.

Executive Summary

IAESDP has faced recurring requests for economic-access support for at least three consecutive years. The need is legitimate, but the association's current Section 501(c)(6) status and its credentialing and accreditation functions create two different sets of constraints. The solution is not one generic "financial assistance" or "scholarship" program. It is a three-part interim architecture with clearly separated mechanisms.

Need	Interim mechanism	Formal term	Long-term home
A person needs help paying an outside ESD education provider	Restricted participant-directed award; ordinarily paid to the provider for the named participant	ESD Participant Access Award	One World ESD Foundation
A person cannot afford IAESDP membership dues	Full or partial reduction of a charge controlled by IAESDP	Membership Access Dues Waiver	Potentially One World, subject to independent-selection and affiliate-transaction review
A candidate cannot afford an IAESDP credentialing fee	Full or partial reduction of an IAESDP-controlled credentialing charge	Credentialing Access Fee Waiver	Potentially One World, with strict separation from credentialing decisions

Core conclusion

Outside-provider expenses are not fee waivers. IAESDP-controlled charges are not scholarships. The programs may share an accessibility purpose, but they require different legal framing, accounting treatment, application forms, decision records, and public language.

What this document contains

- A legal and credentialing-risk explainer.
- The terminology and structural decisions adopted for drafting.
- An implementation roadmap and website cleanup plan.
- The complete Interim ESD Participant Access Awards Policy.
- Website, FAQ, provider-notice, Board-resolution, and internal-procedure copy for Participant Access Awards.
- The complete Interim Economic Access Fee Waiver Policy.
- Membership, credentialing, universal website, application-attestation, and historical-clarification copy for fee waivers.
- A transition framework for moving the programs to One World ESD Foundation.
- Official IRS and credentialing-industry source notes.

Status of the language

The copy in Parts I and II is consolidated as the working final draft developed through this policy process. It is ready for internal review and controlled circulation. It should not be represented as formally adopted, legally approved, or operational until the IAESDP Board has acted and counsel has reviewed the interim structure.

1. Legal and Structural Analysis

1.1 The Section 501(c)(6) constraint

A Section 501(c)(6) business league must primarily improve conditions across a line of business rather than primarily perform particular services for individual persons.¹

The strongest adverse authority for this project is Revenue Ruling 67-251, in which the IRS concluded that a business league providing financial aid and welfare services to members did not qualify under Section 501(c)(6) because earnings inured to private individuals.²

The practical implication is not that IAESDP can never reduce a fee or respond to a recurring field-access problem. It is that IAESDP should not operate a permanent charitable relief program, describe the activity as member financial aid, or allow direct individual benefits to become substantial, preferential, donor-directed, or central to the association's operations.

1.2 Naming is necessary but not sufficient

Replacing “financial assistance” and “scholarship” with more precise terms improves accuracy and reduces public confusion. It does not create a legal safe harbor. Regulators, auditors, accreditors, and courts examine the substance of a program: who benefits, how recipients are selected, what is paid, who controls the decision, whether insiders receive preference, and whether the activity advances the organization's exempt purpose.

1.3 The credentialing and accreditation constraint

Credentialing programs must protect autonomy and impartiality from education and training interests. NCCA materials emphasize clearly delineated roles, impartiality related to education or training leading to certification, management of conflicts, nonrequired association membership, and fee structures that are not onerous.³

Accordingly, IAESDP may not use access support to create a preferred educational pathway, market one provider, influence accreditation, alter certification standards, or give an applicant an advantage in a credentialing decision. The financial-access decision and the credentialing or accreditation decision must be functionally separated.

1.4 Solicitation and donor communications

Contributions to a Section 501(c)(6) organization are not deductible as charitable contributions for federal income-tax purposes, and noncharitable exempt organizations generally must disclose that fact in covered solicitations.⁴

IAESDP should therefore avoid describing the interim program as a charitable scholarship fund and should include a clear nondeductibility notice in written solicitations. Donors and providers must not select recipients, require use of a particular provider, or receive credentialing, accreditation, promotional, or commercial preference in return.

1.5 The most defensible interim theory

IAESDP is conducting temporary, limited, impartial access initiatives intended to reduce recurring barriers to participation across the ESD field while independent charitable infrastructure is being established. The initiatives do not provide general welfare, unrestricted cash, provider sponsorship, preferred educational pathways, or altered credentialing standards.

Counsel gate

Before the first new award or before materially expanding prior fee-waiver practices, IAESDP should obtain a short written review from nonprofit tax counsel addressing Revenue Ruling 67-251, the scale of the programs, eligibility, insider exclusions, donor restrictions, accounting treatment, and the planned transfer to One World ESD Foundation.

2. Council Protocol Assessment

Council member	Assessment
The Contrarian	The largest risk is believing that cleaner terminology cures the underlying issue. It does not. A large, recurring, preferential, or loosely administered benefit program could still look like prohibited individual financial aid or private benefit.
The First Principles Thinker	IAESDP has two fundamentally different transactions: paying or restricting money for an outside educational expense, and deciding not to charge all or part of its own fee. The policies must reflect that economic reality.
The Expansionist	A disciplined interim system creates evidence of need, demand, demographic access barriers, award utilization, and funding gaps. Those data can materially strengthen One World's fundraising case and program design.
The Outsider	A reasonable observer will ask whether money changes credentialing or accreditation outcomes. Every policy, form, and webpage must answer clearly: fee status and award status do not affect standards, scoring, eligibility, accreditation, or discipline.
The Executor	Adopt the two policies, authorize quarterly capacity, create separate accounting codes and forms, appoint an independent appeal reviewer, publish advance notice, and conduct a site-wide terminology audit before reopening the programs.

3. Adopted Terminology and Program Boundaries

Use this term	Use it for	Do not call it
IAESDP Interim ESD Participant Access Awards Program	The temporary umbrella program for eligible expenses charged by outside ESD education providers	Financial aid program; certification scholarship fund; provider grant
ESD Participant Access Award	A restricted participant scholarship applied to an independently selected eligible outside educational expense	Provider sponsorship; IAESDP-approved training; member benefit
IAESDP Interim Economic Access Fee Waiver Program	The umbrella program for reductions of IAESDP-controlled fees	Financial assistance fund; hardship scholarship program
Membership Access Dues Waiver	A full or partial reduction of IAESDP membership dues	Free membership; membership scholarship; member relief
Credentialing Access Fee Waiver	A full or partial reduction of an eligible IAESDP credentialing fee	Credentialing scholarship; free certification; certification financial aid
Waiver capacity / authorized waiver value	The amount or number of IAESDP fees approved for reduction	Scholarship fund; aid fund

3.1 Language to avoid

- Financial assistance or financial aid, except when quoting or correcting historical language.
- Member benefit, relief fund, hardship fund, or welfare assistance.
- Certification scholarship, credentialing scholarship, or free certification.
- IAESDP-sponsored training, IAESDP-approved program, or IAESDP-funded provider.

- Charitable scholarship fund while IAESDP remains the administrator.
- Provider grant, institutional subsidy, or educational partnership when the transaction is a participant-directed award.

4. Implementation Roadmap

4.1 Actions required before opening a new cycle

1. Obtain written nonprofit-tax and credentialing counsel review of the interim architecture.
2. Approve the two policies by Board resolution and document that they are temporary pending transfer to One World ESD Foundation.
3. Authorize a quarterly Participant Access Awards allocation and separate quarterly waiver capacity for membership and credentialing.
4. Create separate accounting codes: Participant Access Awards; Membership Dues Waivers; Credentialing Fee Waivers.
5. Appoint a Participant Access Awards Administrator, a Fee Waiver Administrator, a Finance Approver, and an Independent Appeal Reviewer. Functions may overlap only where conflicts and secondary review are controlled.
6. Configure a timestamped application system and immutable decision log.
7. Create separate forms for Participant Access Awards, Membership Access Dues Waivers, and Credentialing Access Fee Waivers.
8. Create credentialing and accreditation firewalls so substantive evaluators do not receive economic-access information.
9. Publish application opening dates and available quarterly capacity at least 14 calendar days in advance when practicable.
10. Publish nondeductibility language in any written fundraising solicitation administered by IAESDP.

4.2 Website and document terminology audit

Search the public website, member website, candidate handbook, credentialing application, membership application, email templates, invoices, donor materials, Board policies, and staff scripts for the following terms:

- financial assistance
- financial aid
- scholarship
- free membership
- free credentialing
- hardship
- certification scholarship
- sponsored training
- tuition assistance
- member relief

Each instance should be classified before replacement. Outside-provider education costs become Participant Access Awards language. IAESDP membership and credentialing charges become fee-waiver language. Historical records should not be silently rewritten; use the Board clarification in Part II.

4.3 Minimum systems and records

System or record	Minimum requirement
Quarterly authorization	Board or delegated approval showing amount, eligible

System or record	Minimum requirement
	categories, dates, limits, and reserves
Application log	Unique ID, immutable timestamp, completeness status, eligibility result, decision reason, conflicts, appeal status
Accounting	Separate ledger codes for awards and each waiver category; payment/refund reconciliation
Provider record	Invoice, refund policy, conflict disclosure, payment details, nonendorsement acknowledgment
Credentialing firewall	Access restrictions showing economic-access records are not visible to assessors, scorers, or disciplinary decision-makers
Public reporting	Aggregate applications, approvals, waitlist, value issued or waived, appeals, and provider concentration
Transition file	Donor restrictions, Board approvals, transfer authority, data permissions, and pending obligations

4.4 Decisions the Board must still set

Decision	Recommended starting point
Participant award maximum	A published fixed maximum or percentage of eligible cost; do not decide case by case
Award frequency	One Participant Access Award per person in a rolling 12-month period
Waiver frequency	One membership waiver and one credentialing waiver per applicable cycle, subject to published limits
Correction period	Five business days for minor, good-faith omissions
Appeal period	Ten business days
Appeal reviewer	Independent external reviewer or disinterested reviewer outside the original decision
Provider concentration	Set only if needed; publish before opening and apply prospectively
Financial documentation	Concise self-attestation, with targeted verification only for inconsistencies or suspected abuse
Accreditation fees	Exclude for now; conduct a separate organizational-benefit and impartiality analysis

PART I — INTERIM ESD PARTICIPANT ACCESS AWARDS

Scope of Part I

Use this program only when the eligible cost is charged by an outside ESD education provider or other third party. IAESDP does not choose the provider, endorse the program, or pay IAESDP-controlled membership, credentialing, or accreditation fees through this mechanism.

5. IAESDP Interim ESD Participant Access Awards Policy

Policy owner: [Department or position]

Approved by: IAESDP Board of Directors

Effective date: [Date]

Review date: [Date]

Interim administration period: Until administration is transferred to One World ESD Foundation or another qualified charitable administrator

1. Purpose

The International Association of Empowerment Self Defense Professionals (“IAESDP”) establishes the Interim ESD Participant Access Awards Program to reduce financial barriers that prevent eligible individuals from participating in Empowerment Self Defense education and training.

The program is intended to:

- expand fair access to ESD education;
- address recurring economic barriers to entry and participation in the ESD field;
- support broader workforce development and field capacity;
- increase access to educational opportunities without favoring a particular provider, program, certificate, certification, curriculum, or pathway;
- strengthen the availability of competent ESD instruction and programming; and
- administer limited participant-directed assistance through a transparent and impartial process.

The program is temporary and limited. It is intended to operate only until One World ESD Foundation is legally established, appropriately tax-exempt, operationally capable, and adequately funded to assume responsibility for the program.

The program is not intended to provide:

- general financial assistance;
- a member benefit or rebate;
- compensation or employment benefits;
- institutional support to an education provider;
- a subsidy for a particular certificate or certification program;
- endorsement of a provider, curriculum, or educational pathway;
- unrestricted personal cash grants; or
- a preferred pathway to IAESDP credentialing or accreditation.

2. Interim Section 501(c)(6) status

IAESDP is a tax-exempt business league under Internal Revenue Code Section 501(c)(6), not a Section 501(c)(3) charitable organization.

Accordingly:

1. The Interim ESD Participant Access Awards Program must advance IAESDP's association-wide purposes and may not be operated primarily for the private benefit of particular individuals, members, businesses, or education providers.
 2. The program must remain temporary, limited, provider-neutral, and connected to reducing field-wide barriers to ESD education and participation.
 3. Membership in IAESDP is neither required nor preferred.
 4. IAESDP membership dues, credentialing fees, accreditation fees, application fees, renewal fees, and other amounts owed directly to IAESDP are not eligible expenses.
 5. Program funds must be separately tracked and used only for the purposes described in this policy.
 6. No award may be issued until a quarterly Participant Access Awards allocation has been formally authorized and publicly announced.
 7. The Board may suspend the program at any time if legal, tax, financial, impartiality, or operational concerns arise.
 8. IAESDP intends to transfer the program to One World ESD Foundation as soon as the Foundation is legally and operationally prepared to administer it.
- Public solicitations must clearly state that contributions to IAESDP are not deductible as charitable contributions for federal income-tax purposes.

3. Participant-directed assistance — not provider support or endorsement

A Participant Access Award is issued for the benefit of an eligible individual to help pay an approved expense connected to an ESD educational opportunity independently selected by that individual.

As a credentialing and accreditation agency, IAESDP must remain impartial among education providers, certificate programs, certification programs, curricula, and educational pathways.

IAESDP therefore does not provide institutional financial support, promotional preference, or endorsement to a particular education provider or program through this initiative.

IAESDP may provide neutral, participant-directed access awards that eligible individuals apply toward educational opportunities they independently select, subject to published eligibility requirements, financial controls, and impartiality safeguards.

A Participant Access Award:

- belongs to the eligible participant for the restricted educational purpose approved by IAESDP;
- is not a grant, sponsorship, contribution, commercial subsidy, or unrestricted payment to the provider;
- does not constitute IAESDP approval, recommendation, ranking, recognition, accreditation, sponsorship, or endorsement of the provider, course, instructor, curriculum, certificate, certification, or educational approach;
- does not indicate that the selected opportunity is the best, only, preferred, required, or recommended route to an IAESDP credential;
- does not guarantee admission, successful completion, certification, credentialing, employment, accreditation, or any other educational or professional outcome; and
- may not be represented by a provider or recipient as an "IAESDP-approved," "IAESDP-sponsored," "IAESDP-funded," "IAESDP-recognized," or "IAESDP-recommended" program.

The participant is solely responsible for selecting an educational opportunity that meets the participant's circumstances, objectives, and needs.

IAESDP's administrative determination that an expense may receive payment does not constitute an evaluation of the educational quality, effectiveness, safety, or comparative value of the selected opportunity.

4. Separation from credentialing and accreditation

Administration of the Interim ESD Participant Access Awards Program must remain separate from IAESDP credentialing, certification, and accreditation decisions.

Accordingly:

1. Receiving, declining, requesting, or appealing an access award may not affect a person's credentialing eligibility, assessment, score, status, disciplinary proceeding, or recertification.
2. Receipt of an access award may not affect a provider's accreditation application, review, status, monitoring, renewal, or disciplinary proceeding.
3. IAESDP may not give preference to a provider because it is accredited, seeking accreditation, affiliated with IAESDP, represented in IAESDP governance, or operated by an IAESDP member.
4. IAESDP may not give preference to an applicant because the applicant is pursuing a particular certificate, certification, credential, or educational pathway.
5. Credentialing and accreditation evaluators will not receive Participant Access Awards information except when necessary to investigate fraud, legal noncompliance, safety concerns, or a material conflict of interest.
6. Individuals with access to confidential examinations, accreditation deliberations, or pending provider decisions should not administer awards involving affected candidates or providers.
7. Where complete staff separation is not practical, IAESDP must document the firewall, recusal, supervisory review, and access controls used to preserve impartiality.
8. An award decision may not be used as evidence supporting or opposing any credentialing or accreditation determination.

5. Definitions

Applicant: An individual requesting a Participant Access Award. A parent or legal guardian may apply on behalf of an eligible minor when the applicable quarterly announcement permits awards for minors.

Participant Access Award: A limited, restricted participant scholarship issued for the benefit of an eligible individual and applied only to an approved ESD educational expense selected by that individual. A Participant Access Award is not institutional support, sponsorship, accreditation, recognition, endorsement, or a provider grant.

Interim ESD Participant Access Awards Program: The temporary IAESDP initiative established under this policy to reduce economic barriers to eligible ESD education while One World ESD Foundation is being established and prepared to assume administration.

Eligible opportunity: A course, class, workshop, training program, conference educational session, certificate program, certification-related educational activity, or other ESD educational opportunity falling within the neutral categories published for the applicable quarter. Designation as an eligible opportunity for payment purposes does not constitute approval, endorsement, recognition, or accreditation by IAESDP.

Eligible participant expense: A reasonable and documented expense incurred for the benefit of the named participant and falling within the expense categories published for the applicable quarter.

Complete application: An application containing all required information, attestations, documents, and authorizations needed to determine administrative eligibility.

Administrative eligibility: Compliance with the published requirements of the Participant Access Awards Program. Administrative eligibility is not a judgment about the comparative value, educational quality, instructional philosophy, certification status, or accreditation status of a provider or program.

Provider: The independent organization or individual delivering the educational opportunity selected by the participant.

Quarterly allocation: The amount formally authorized and made available for Participant Access Awards during a stated application period.

6. Quarterly funding announcements

Before each application period, IAESDP will publish:

- the total Participant Access Awards allocation available;
- the application opening date and time;

- the application closing date, if applicable;
- the maximum award per participant;
- the neutral categories of educational opportunities and expenses covered;
- any geographic, programmatic, or participant limitations;
- the estimated number of awards;
- the period in which the educational opportunity must begin;
- whether a waitlist will be maintained;
- any provider-concentration limitation;
- any administrative or appeal reserve; and
- the current status of the allocation: upcoming, open, waitlist only, or closed.

Funds will not be promised before the quarterly allocation is formally approved and publicly posted.

IAESDP should ordinarily announce the application opening at least 14 calendar days in advance.

Quarterly announcements must not promote, recommend, or give preferential visibility to a particular provider, certificate, certification, curriculum, or educational pathway.

7. Applicant eligibility

Unless a quarterly announcement establishes additional neutral requirements, an applicant must:

1. be applying for their own participation or, where permitted, applying as the parent or legal guardian of a minor participant;
2. select an opportunity that falls within the published quarterly categories;
3. attest that cost presents a meaningful barrier to participation;
4. disclose other confirmed funding available for the same expense;
5. submit truthful and complete information;
6. agree to the payment, refund, privacy, and verification requirements;
7. not be disqualified under the conflict-of-interest provisions; and
8. not have received more than the permitted number or value of awards during the applicable period.

IAESDP may ordinarily limit awards to one award per person during any 12-month period and a maximum lifetime or multiyear amount established by the Board.

Membership in IAESDP may not increase an applicant's likelihood of receiving an award.

8. Persons ineligible during interim IAESDP administration

To reduce private-inurement, favoritism, and conflict-of-interest risks, the following persons are ineligible while IAESDP administers the program:

- current IAESDP officers and directors;
- IAESDP employees with authority over the program;
- members of the award review or appeals process;
- individuals who control or materially influence the quarterly allocation;
- spouses, domestic partners, parents, children, siblings, household members, and other immediate family members of the persons listed above; and
- any person whose award would create an actual or apparent conflict that cannot be adequately managed through recusal.

The Board may expand these exclusions but should not waive them for a particular applicant.

9. Eligible providers and opportunities

Provider membership in IAESDP is not required.

IAESDP accreditation, recognition, membership, partnership, sponsorship, governance participation, or prior relationship is neither required nor preferred.

The provider or opportunity's accreditation, certification, certificate, membership, or partnership status may not be used to move an application ahead of another application.

For payment-administration purposes, a provider must ordinarily:

1. be legally permitted to deliver the opportunity in the relevant jurisdiction;
2. provide a public or written description of the opportunity;
3. provide the tuition, fee, or required-cost information;
4. provide an invoice or other acceptable payment documentation;
5. accept third-party payment or reimbursement under IAESDP's approved procedure;
6. provide a cancellation and refund policy;
7. agree that any refund attributable to the Participant Access Award will be returned to IAESDP or its successor fund administrator;
8. agree not to describe the award as IAESDP endorsement, approval, sponsorship, recognition, or accreditation;
9. disclose any ownership, employment, financial, family, governance, or other material relationship with IAESDP decision-makers; and
10. comply with any basic safety, consent, nondiscrimination, and participant-protection requirements published for the applicable quarter.

Verification of these requirements is solely an administrative funding determination. It does not constitute accreditation, recognition, endorsement, certification, approval of curriculum, approval of instructional methodology, a determination of educational equivalence, or a comparative quality review.

10. Eligible expenses

A quarterly announcement may authorize payment for:

- tuition;
- registration fees;
- required course materials;
- required participant equipment;
- required assessment or examination fees charged by an entity independent from IAESDP;
- reasonable accessibility expenses necessary for participation; or
- other specifically published educational expenses.

Eligible expenses must be reasonable, documented, and directly connected to the approved participant's attendance.

11. Ineligible expenses

Unless expressly authorized in the quarterly announcement, the program will not pay for:

- IAESDP membership dues;
- IAESDP credentialing, accreditation, application, or renewal fees;
- cash stipends or unrestricted payments;
- wages, lost income, honoraria, or compensation;
- costs already paid before approval;
- personal debt;
- meals, lodging, or travel;
- optional merchandise;
- general business expenses;
- equipment retained primarily for commercial use;
- penalties, late charges, or cancellation fees caused by the participant;
- expenses already paid by an employer, sponsor, provider, government program, or another award;
- donations earmarked by a donor for a named person;

- expenses conditioned on services to IAESDP or a donor; or
- any expense that would create an impermissible private benefit or conflict of interest.

12. First-completed, first-served allocation

Qualified applications will be funded in the order in which complete applications are received, subject to:

- available quarterly funds;
- the individual award limit;
- any provider-concentration rule published before applications open;
- conflict-of-interest review;
- fraud and duplication checks; and
- compliance with this policy.

IAESDP personnel do not rank applicants by merit, popularity, personal hardship narrative, membership, professional reputation, perceived deservingness, provider selected, certificate or certification pursued, accreditation status, educational philosophy, or personal or professional relationship to IAESDP.

IAESDP personnel may not advise an applicant to select a particular provider or educational pathway in order to improve the applicant's likelihood of receiving an award.

Timestamp

The electronic application system's recorded submission time is the official timestamp. If an applicant uses an approved accessible or staff-assisted application method, staff will enter the application promptly and record the time the applicant first supplied the required information.

Incomplete applications

An applicant whose submission contains a minor, correctable omission will be notified and ordinarily given five business days to correct it.

The original timestamp may be preserved when the applicant submitted the application in good faith, the missing information is minor and does not change fundamental eligibility, and the correction is received by the stated deadline.

A blank, placeholder, materially incomplete, or knowingly inaccurate application does not preserve a position in the queue.

Identical timestamps

If the system records two complete applications at the same timestamp resolution and insufficient funds remain for both, the order will be determined by a documented random process conducted by two authorized persons.

13. Waitlist

Once the available allocation is provisionally committed, additional eligible applicants may be placed on a timestamped waitlist.

Waitlisted applicants may receive an award when an applicant declines; an applicant fails to accept or enroll by the deadline; a provider cannot accept payment; an award is reduced; a refund is returned; additional funds are formally added to the quarter; or another approved applicant becomes ineligible.

Placement on a waitlist does not guarantee an award. Unless otherwise stated, a waitlist expires at the end of the applicable quarter or funding cycle. Applicants must reapply for a later cycle.

14. Administrative review

The Participant Access Awards Administrator will review applications only for:

- completeness;

- applicant eligibility;
- opportunity and expense eligibility;
- available funds;
- duplicate funding;
- conflicts of interest;
- provider payment information; and
- indications of fraud, misrepresentation, or prohibited influence.

The administrator will use a standardized checklist. Narrative discretion should be minimized.

An application will receive one of the following statuses: approved; provisionally approved pending verification; waitlisted; additional information required; administratively ineligible; or closed because funds are exhausted.

15. Conflicts of interest and recusal

Anyone participating in administration, verification, payment, or appeal must disclose actual, potential, and apparent conflicts.

A person must recuse when they:

- have a financial interest in the provider;
- work for or govern the provider;
- are related to or share a household with the applicant;
- have a close personal, supervisory, or business relationship with the applicant;
- participated in a dispute involving the applicant or provider;
- could benefit financially from approval or denial; or
- cannot make an impartial administrative determination.

Recusal and reassignment must be documented. Providers and donors may not participate in decisions concerning their students, personnel, relatives, customers, or preferred recipients.

16. Notice of decision

Applicants will receive a written decision containing:

- the decision status;
- the approved amount, when applicable;
- the approved expense;
- any conditions or deadlines;
- payment instructions;
- the reason for an ineligibility determination;
- waitlist information, where applicable; and
- instructions for requesting clarification or filing an appeal.

17. Acceptance and enrollment

An approved applicant must ordinarily:

1. accept the award within 10 business days;
2. authorize payment verification;
3. complete any required provider enrollment steps;
4. provide a final invoice or registration confirmation; and
5. notify IAESDP promptly of cancellations, refunds, other funding, or material changes.

Failure to meet a deadline may result in withdrawal of the award and release of funds to the next eligible applicant. Reasonable extensions may be granted for disability access, emergencies, provider delays, or other documented circumstances, provided the extension is applied consistently.

18. Payment

IAESDP will ordinarily pay the approved amount directly to the participant's selected provider for application to the named participant's approved expense.

Direct payment is an administrative control intended to ensure that funds are used only for the approved purpose.

Direct payment:

- does not convert the award into a provider grant;
- does not constitute institutional financial support;
- does not create a partnership or sponsorship;
- does not constitute endorsement, recognition, or accreditation; and
- does not permit the provider to use IAESDP's name or logo for promotional purposes.

Every payment record and provider notice must include substantially the following statement:

This payment is made solely for the benefit of the named participant through the IAESDP Interim ESD Participant Access Awards Program. It does not constitute IAESDP approval, accreditation, recognition, sponsorship, recommendation, or endorsement of the provider, instructor, curriculum, certificate, certification, or educational program. The provider may not represent the award as evidence of any such status.

Reimbursement to a participant may be allowed only when direct payment is not reasonably available; reimbursement was approved in writing before the expense was incurred; the participant submits acceptable proof of payment; and finance personnel confirm that reimbursement is legally and administratively appropriate. No applicant should assume that reimbursement will be permitted.

19. Refunds, cancellations, and unused funds

Participant Access Award-funded refunds must be returned to IAESDP or the successor fund administrator, not retained by the provider or paid to the participant.

If a participant withdraws, transfers, or fails to attend:

- the provider's published refund policy will apply;
- any recoverable award amount must be returned to the program;
- unrecoverable expenses may be charged against the participant's award history; and
- IAESDP may consider documented emergencies when determining future eligibility.

A recipient may not transfer an award to another person. Changes in course, date, expense, or provider require prior written approval.

20. Recipient responsibilities

Recipients must:

- use the award only for the approved purpose;
- provide accurate information;
- disclose duplicate or later-received funding;
- comply with reasonable verification requests;
- avoid representing the award as provider endorsement;
- notify IAESDP of material changes;
- return improperly received funds; and
- complete any short, nonintrusive program-closeout confirmation.

Recipients will not be required to provide services, volunteer labor, testimonials, political support, marketing content, or promotional appearances as a condition of receiving the award. Public recognition will occur only with the recipient's affirmative consent.

21. Provider responsibilities

A provider receiving payment must:

- apply the payment only to the named participant's approved expense;
- identify the payment accurately in its records;
- return award-funded refunds;
- avoid using the award as evidence of endorsement;
- refrain from promising or guaranteeing award approval;
- refrain from submitting false or mass-generated applications;
- disclose relevant relationships;
- cooperate with reasonable financial verification; and
- comply with applicable participant-safety and nondiscrimination requirements.

A provider may be suspended from receiving future payments for fraud, misuse, refusal to return funds, misrepresentation of IAESDP's role, or material failure to comply with administrative requirements.

Suspension from award-payment eligibility is not an accreditation decision and must not be publicly described as one.

22. Clarification, appeals, and resolution

Informal clarification

An applicant may request a plain-language explanation of a decision before filing a formal appeal. IAESDP should respond within five business days when practicable. A clarification request does not extend the appeal deadline unless IAESDP states otherwise.

Grounds for appeal

An applicant may appeal only on one or more of the following grounds:

1. IAESDP relied on a material factual error.
2. IAESDP misapplied the published eligibility requirements.
3. The application timestamp or queue position was recorded incorrectly.
4. A required procedure was not followed.
5. An undisclosed conflict of interest materially affected the determination.
6. Required information was submitted on time but was not considered.
7. An approved accessibility procedure was not provided.
8. Provider, certificate, certification, accreditation, membership, or relationship status was improperly considered.

Matters that are not appealable

- disagreement with the policy itself;
- lack or exhaustion of available funds;
- dissatisfaction with the award limit;
- an applicant's failure to meet a published deadline;
- a provider's unwillingness to accept payment;
- a request to give one applicant priority over another;
- disagreement with a validly recorded timestamp;
- disagreement with a properly published provider-concentration rule;
- a request that IAESDP evaluate, approve, rank, or endorse the educational quality of a provider;
- a request that IAESDP determine which certificate, certification, curriculum, or educational pathway is preferable; or
- dissatisfaction because IAESDP declined to recommend a provider.

Filing and review

An appeal must be submitted within 10 business days after the decision notice. The appeal may be submitted through a simple online form or by email and must identify the decision being appealed, the applicable appeal ground, the claimed error, and any supporting information. No formal legal language is required.

The appeal will be reviewed by a person who did not make the original determination, has no conflict of interest, has access to the relevant policy and administrative record, and has authority to correct a procedural or factual error. Where internal independence is not practical, IAESDP may appoint an external reviewer.

IAESDP will ordinarily acknowledge the appeal within three business days and issue a written decision within 15 business days.

The reviewer may uphold the decision; correct a factual or procedural error; restore or correct a queue position; return the application for reconsideration; approve the application if eligibility and funds permit; or grant priority for the next available funds when an appeal succeeds after the original funds have been committed. The appeal decision is final under this policy.

Retaliation against an applicant for seeking clarification, appealing, reporting a concern, or requesting accessibility assistance is prohibited.

23. Complaints about administration

A person may submit a complaint regarding staff conduct, accessibility, privacy, conflicts of interest, provider misrepresentation, fraud, discrimination, retaliation, or systemic failure to follow the policy. A complaint is distinct from an appeal of an individual funding decision.

Complaints will be assigned to an impartial reviewer and tracked through resolution. Where appropriate, IAESDP will identify corrective action without publicly disclosing confidential applicant information.

24. Accessibility and nondiscrimination

IAESDP will administer the program without unlawful discrimination.

The application process should be:

- mobile accessible;
- written in plain language;
- available through an alternative format or staff-assisted process when reasonably needed;
- free of unnecessary essays, references, recommendation letters, or complex financial documentation; and
- designed to collect only information necessary for eligibility and administration.

Applicants may request a reasonable accommodation without losing their queue position because of the time reasonably required to provide the accommodation. Language access should be expanded as resources permit.

25. Privacy and confidentiality

IAESDP will collect only information reasonably necessary to administer the program.

Application information will be shared only with authorized program personnel; finance personnel; an independent reviewer; the selected provider as needed for payment; legal, accounting, or auditing professionals; or governmental authorities when legally required.

IAESDP will not publicly identify a recipient without consent. Records will be retained according to IAESDP's document-retention policy and applicable legal requirements.

26. Transparency reporting

Following each funding period, IAESDP will publish an aggregate report containing, as appropriate:

- the amount available;
- the number of complete applications;
- the number and total value of awards;
- the number of waitlisted applicants;
- the amount returned or carried forward;
- the number of appeals and their general disposition;
- aggregate provider concentration; and
- any material administrative changes.

Reports will not identify applicants without affirmative consent. IAESDP should periodically examine whether its first-completed, first-served system is creating recurring barriers or unequal access and document any responsive changes.

27. Tax notice

IAESDP does not provide tax advice. Depending on the recipient's circumstances, the type of educational program, and the expenses covered, an award may or may not qualify for exclusion from taxable income. Recipients are responsible for obtaining their own tax advice. IAESDP will maintain appropriate records and issue any tax documentation required by law after consultation with its accountant or tax advisor.

28. Fraud, misuse, and recovery

IAESDP may deny, suspend, revoke, or recover an award when there is evidence of material misrepresentation, falsified documents, duplicate payment, undisclosed conflicts, diversion of funds, collusion with a provider or donor, impersonation, prohibited transfer, or other misuse.

Before final adverse action, the affected person should ordinarily receive notice and an opportunity to respond, unless immediate action is required to protect funds or comply with law.

29. Donor and provider restrictions

A donor may not:

- choose, identify, or nominate the recipient;
- condition a contribution on payment to a named person;
- require payment to a particular provider;
- require attendance in a particular certificate or certification program;
- require use of a particular curriculum or educational pathway;
- direct funds back to the donor's employees, customers, students, relatives, or affiliates;
- receive referral fees, commercial advantage, promotional preference, accreditation advantage, credentialing advantage, or governance influence in exchange for supporting the program; or
- characterize its support as sponsorship or endorsement of a particular educational provider through IAESDP.

Provider contributions must be pooled and administered without preference for that provider or its students.

No provider may contribute funds on the condition that those funds be used for its own programs, instructors, candidates, customers, a certificate it issues, a certification it administers, or an affiliated educational pathway.

Any broad donor restriction—such as geography, population served, access barrier, or type of educational expense—must be approved before acceptance and must be consistent with this policy, IAESDP's exempt purposes, impartiality obligations, and the planned transfer to One World ESD Foundation.

30. Transition to One World ESD Foundation

The Interim ESD Participant Access Awards Program is intended to transfer to One World ESD Foundation once the Foundation is legally established, recognized as appropriately tax-exempt, operationally capable,

adequately funded, and prepared to administer participant assistance in accordance with applicable charitable, financial, and scholarship requirements.

The transition will require:

1. formal approval by the governing bodies;
2. review of donor restrictions and transfer authority;
3. a written transfer, services, or affiliation agreement;
4. separate financial accounting;
5. protection and lawful transfer of applicant data;
6. public notice of the administrative change;
7. a plan for pending applications, waitlisted applicants, and approved awards;
8. adoption of a successor policy by One World ESD Foundation; and
9. clear separation between Foundation scholarship decisions and IAESDP credentialing and accreditation decisions.

IAESDP will not automatically transfer restricted funds when donor consent, contractual approval, or other legal authority is required. Future solicitations should disclose that legally transferable funds may later be transferred to and administered by One World ESD Foundation. The transfer of administration will not convert any prior IAESDP payment into provider endorsement, accreditation, recognition, or sponsorship.

31. Amendments and interpretation

The Board may amend this policy prospectively.

Eligibility requirements, award limits, provider-concentration limits, or application rules may not be changed after an application period opens in a manner that disadvantages applicants already participating in that cycle, except when necessary to comply with law; preserve IAESDP's tax-exempt status; protect credentialing or accreditation impartiality; protect program funds; respond to fraud or misuse; or correct a material administrative problem.

Questions of interpretation will be resolved consistently with transparent and impartial administration; provider and pathway neutrality; the published quarterly announcement; IAESDP's exempt purposes; protection against private inurement and improper private benefit; separation from credentialing and accreditation decisions; and the planned transition to One World ESD Foundation.

6. Participant Access Awards — Website Landing Page Copy

IAESDP Interim ESD Participant Access Awards

IAESDP's Interim ESD Participant Access Awards Program helps reduce financial barriers that prevent eligible individuals from participating in Empowerment Self Defense education.

Participant Access Awards are limited, participant-directed scholarships. Applicants independently select their own eligible educational opportunities.

IAESDP does not select, recommend, rank, sponsor, approve, recognize, or endorse a particular education provider, instructor, certificate program, certification program, curriculum, training methodology, or pathway to credentialing.

The program is temporary and is intended to transfer to One World ESD Foundation once the Foundation is legally established, appropriately tax-exempt, operationally prepared, and funded.

Current funding

- Application status: [Upcoming/Open/Waitlist/Closed]
- Applications open: [Date and time, including time zone]
- Available this quarter: [\$ Amount]
- Maximum Participant Access Award: [\$ Amount]
- Eligible educational activities: [Brief description]
- Training must begin by: [Date]

How awards are made

Participant Access Awards are issued on a first-completed, first-served basis while publicly announced quarterly funds remain available.

We do not score essays, compare hardship stories, or rank applicants.

We do not give preference based on IAESDP membership; personal or professional relationships; professional reputation; the provider selected; the certificate or certification pursued; whether a provider is an IAESDP member; whether a provider is accredited or seeking accreditation; whether a provider has an existing relationship with IAESDP; or whether IAESDP personnel are familiar with the provider.

Your place in the queue is based on the timestamp of your complete application.

Who may apply?

You may apply when cost presents a meaningful barrier to participation; your selected educational opportunity falls within the category funded that quarter; you have not exceeded the current award limit; you provide the required registration and cost information; you disclose other confirmed funding for the same expense; and neither you nor the people administering your application have a disqualifying conflict of interest.

IAESDP membership is not required and does not improve your likelihood of receiving an award.

What may an award pay for?

Each quarterly announcement identifies the eligible expenses. These may include tuition or registration; required course materials; required participant equipment; required assessments charged by an entity other than IAESDP; accessibility expenses necessary for participation; or other specifically listed educational expenses.

Participant Access Awards ordinarily do not cover unrestricted cash payments; wages or lost income; general business expenses; costs already paid; travel or lodging; optional merchandise; IAESDP membership dues; IAESDP credentialing fees; IAESDP accreditation fees; or other amounts owed directly to IAESDP.

How payment works

A Participant Access Award is issued for the benefit of the eligible participant. IAESDP ordinarily pays the approved amount directly to the participant's independently selected provider. The provider must apply the payment only to the named participant's approved expense.

Direct payment is used to protect the restricted purpose of the award. It does not make the payment a provider grant, sponsorship, endorsement, partnership, accreditation decision, or institutional subsidy. If the participant cancels and a refund is due, the Participant Access Award portion must be returned to the program.

IAESDP does not endorse providers or programs

A Participant Access Award does not mean that IAESDP recommends the provider; approves the instructor or curriculum; recognizes the certificate or certification; considers the program the best or preferred option; has determined that the program is equivalent to another program; guarantees the safety or quality of the educational opportunity; guarantees that the participant will complete the program; guarantees certification or credentialing; gives the provider an advantage in accreditation; or considers the selected opportunity a required or preferred route to an IAESDP credential.

Providers and recipients may not advertise an award as IAESDP approval, accreditation, recognition, sponsorship, endorsement, or an IAESDP-recommended training pathway.

What happens after I apply?

1. You submit the application.
2. The application system records your submission time.
3. We check the application for completeness and administrative eligibility.
4. We may ask you to correct a minor omission.
5. Complete and eligible applications are approved in timestamp order while funds remain.
6. When funds are provisionally committed, eligible applicants may be placed on a waitlist.
7. Approved funds are paid after enrollment, provider, and cost information are verified.

Administrative verification does not constitute an evaluation or endorsement of the provider or educational opportunity.

What if my application is incomplete?

We will ordinarily give you five business days to correct a minor omission. Your original timestamp may be preserved when the application was submitted in good faith, the omission is minor, the missing information does not fundamentally change eligibility, and the correction is received by the stated deadline. Blank, placeholder, or materially incomplete submissions do not reserve funding.

Can I appeal?

Yes, but appeals are limited to administrative errors. You may appeal when you believe we relied on incorrect information; applied the published requirements incorrectly; recorded your timestamp incorrectly; failed to follow a required procedure; allowed a conflict of interest to affect the decision; overlooked information submitted on time; failed to provide an approved accessibility process; or improperly considered provider, certification, accreditation, membership, or relationship status.

An appeal cannot create additional funds or move one applicant ahead of another unless an administrative error occurred. Appeals must be filed within 10 business days. A person who did not make the original decision will review the appeal.

Accessibility

You may request help or a reasonable accommodation in completing the application. Requesting assistance will not reduce your eligibility or intentionally disadvantage your place in the application process.

Accessibility contact: [Email/telephone]

Important organizational and tax information

IAESDP is a Section 501(c)(6) professional association, not a Section 501(c)(3) charitable organization. Contributions to IAESDP are not deductible as charitable contributions for federal income-tax purposes. A Participant Access Award may have tax consequences depending on the recipient, educational program, and expenses covered. IAESDP cannot provide individual tax advice.

Future administration

The Interim ESD Participant Access Awards Program is expected to transfer to One World ESD Foundation once the Foundation is legally established, appropriately tax-exempt, operationally prepared, and adequately funded. Applicants and recipients will be notified before any administrative transfer that affects a pending application or approved award.

7. Participant Access Awards — Short Website FAQ

What is a Participant Access Award?

A Participant Access Award is a limited, participant-directed scholarship that helps an eligible individual pay an approved expense connected to an ESD educational opportunity the individual independently selects.

How much money is available?

IAESDP posts the available Participant Access Awards allocation before each quarterly application period.

How are recipients selected?

Complete and eligible applications are approved in timestamp order while funds remain.

Is this a competition?

No. We do not rank essays, compare personal hardship stories, or select the person we consider “most deserving.”

Do I have to be an IAESDP member?

No. Membership is neither required nor preferred.

Does IAESDP choose my education provider?

No. Applicants independently select their own educational opportunities. IAESDP personnel may not direct you toward a particular provider, certificate, certification, curriculum, or educational pathway in order to receive an award.

Does an award mean IAESDP endorses my provider?

No. An award does not constitute approval, accreditation, recognition, sponsorship, recommendation, endorsement, or a finding that the program is a preferred pathway to credentialing.

Can I use the award for IAESDP fees?

No. Participant Access Awards may not be used for IAESDP membership, credentialing, accreditation, application, renewal, or related IAESDP fees.

Will I receive the money directly?

Ordinarily, IAESDP pays the provider directly for the named participant’s approved expense. This direct payment is an administrative safeguard. It is not a grant or subsidy to the provider.

What happens when funds run out?

Eligible applicants may be placed on a timestamped waitlist. A waitlist does not guarantee an award.

Can I appeal a decision?

You may appeal a material factual error, procedural error, incorrect timestamp, misapplication of the published requirements, an undisclosed conflict, failure to consider timely information, an accessibility failure, or improper consideration of provider, certification, accreditation, membership, or relationship status. You cannot appeal solely because quarterly funds were exhausted.

Can a provider promise that I will receive an award?

No. Providers cannot guarantee, reserve, or control an IAESDP Participant Access Award.

Can a provider advertise that IAESDP funded or approved its program?

No. A provider may acknowledge that payment was received for a named participant, but it may not represent the payment as IAESDP approval, sponsorship, accreditation, recognition, recommendation, or endorsement.

Are contributions tax deductible?

No. IAESDP is a Section 501(c)(6) organization. Contributions are not deductible as charitable contributions for federal income-tax purposes.

Who will administer the program in the future?

The program is intended to transfer to One World ESD Foundation once the Foundation is legally established, appropriately tax-exempt, operationally prepared, and funded.

8. Participant Access Awards Selection and Approval Procedure

Roles

Board of Directors

- adopts the policy;
- approves the annual or quarterly funding allocation;
- approves material restrictions;
- reviews aggregate reports; and
- does not select individual recipients.

Participant Access Awards Administrator

- publishes the quarterly announcement;
- manages the application system;
- conducts standardized eligibility review;
- maintains the timestamped queue;
- communicates with applicants and providers;
- documents recusals; and
- prepares approvals for payment.

Finance Approver

- confirms available funds;
- verifies payment documentation;
- approves the financial transaction;
- tracks refunds and unused balances; and
- maintains a separate Participant Access Awards ledger or fund code.

Independent Appeal Reviewer

- did not make the original decision;
- has no conflict of interest;
- reviews only the administrative record and appeal grounds;
- issues a written decision; and
- reports systemic problems without disclosing unnecessary personal information.

Where internal independence is not practical, IAESDP appoints a qualified external reviewer.

Quarterly workflow

Stage	Required action	Responsible role	Target timing
1. Confirm funds	Verify cash received, restrictions, prior commitments, reserve, and available balance	Finance	Before announcement
2. Authorize allocation	Approve total funds, maximum award, eligible categories, dates, and any provider cap	Board or delegated authority	Before announcement
3. Compliance check	Confirm counsel/accounting requirements and donor disclosures	Executive/Legal/Finance	Before opening
4. Publish announcement	Post all rules, amounts, opening time, deadlines, and fund status	Administrator	At least 14 days before opening
5. Open applications	Activate timestamped application and accessible alternatives	Administrator	Published date and time

Stage	Required action	Responsible role	Target timing
6. Intake	Assign application number and preserve system record	Automated/Admin	Immediately
7. Completeness review	Use checklist; request permitted corrections	Administrator	Within five business days
8. Conflict review	Check applicant, provider, staff, Board, donor, and financial relationships	Administrator/Supervisor	Before decision
9. Eligibility decision	Approve, waitlist, request information, or deny using standardized reason codes	Administrator	In queue order
10. Financial reservation	Reserve approved amount in ledger	Finance	At provisional approval
11. Applicant acceptance	Obtain acceptance and enrollment authorization	Applicant/Admin	Within 10 business days
12. Provider verification	Obtain invoice, refund policy, payment information, and nonendorsement acknowledgment	Administrator	Before payment
13. Payment approval	Match award, invoice, applicant, and fund balance	Finance Approver	Before disbursement
14. Payment	Pay provider and document transaction	Finance	Promptly after approval
15. Waitlist release	Offer funds to next eligible applicant when funds become available	Administrator	In timestamp order
16. Closeout	Confirm attendance or disposition and process refunds	Administrator/Finance	After activity
17. Reporting	Publish aggregate quarterly results	Executive/Admin	Within 45 days after cycle
18. Review	Identify access barriers, provider concentration, complaints, and corrective actions	Board/Administrator	At least annually

Application queue rules

1. Every application receives a unique application number.
2. The system-generated timestamp is locked and retained.
3. Staff cannot manually change the timestamp without a written explanation, supervisory approval, and an audit-log entry.
4. Staff review applications in timestamp order.
5. A minor correction may preserve the timestamp.
6. A materially incomplete application does not hold funds.
7. When funds are insufficient for the next full request, the applicant may accept a partial award if partial awards were announced, remain first on the waitlist, or decline without penalty.
8. Staff may not skip an applicant because another application is easier to process.
9. Any departure from order must cite a published policy provision and be documented.

Standardized eligibility checklist

- Application submitted during the permitted period.
- Applicant is eligible to apply.
- Financial-barrier attestation completed.

- Applicant has not exceeded the award-frequency limit.
- Opportunity falls within the quarterly category.
- Expense is eligible.
- Activity begins within the permitted period.
- Amount requested is within the maximum.
- Other funding is disclosed.
- Provider information is sufficient.
- Provider can accept payment or approved reimbursement applies.
- No disqualifying applicant conflict exists.
- No disqualifying reviewer conflict exists.
- No donor-directed or provider-directed arrangement exists.
- No preference was given or denied based on the selected provider, instructor, certificate, certification, curriculum, accreditation status, IAESDP membership, or relationship to IAESDP.
- No reviewer has participated in, advised on, or holds responsibility for a pending credentialing, certification, or accreditation decision materially involving the applicant or selected provider.
- Required attestations and authorizations are signed.
- Funds remain available or waitlist placement is appropriate.

The administrator records Yes, No, or Additional Information Required. No narrative scoring should be added.

Standard decision reason codes

Category	Code and reason
Approval	A01 — Eligible and funds available; A02 — Eligible for partial amount; A03 — Provisional approval pending provider verification
Additional information	I01 — Missing cost documentation; I02 — Missing activity information; I03 — Missing attestation or authorization; I04 — Potential duplicate funding; I05 — Potential conflict requiring review
Waitlist	W01 — Eligible; quarterly funds provisionally committed; W02 — Eligible; published provider concentration limit reached; W03 — Eligible; administrative reserve not yet released
Ineligible	D01 — Expense not covered; D02 — Activity outside funded category; D03 — Applicant exceeded award limit; D04 — Cost previously incurred; D05 — Materially incomplete; D06 — Correction deadline missed; D07 — Disqualifying conflict; D08 — Duplicate or fully funded expense; D09 — Provider cannot meet payment requirements; D10 — Material misrepresentation; D11 — Late application; D12 — Other published requirement not met; D13 — Unresolved credentialing, accreditation, financial, or governance conflict
Closed	C01 — Funds exhausted and no waitlist; C02 — Withdrawn; C03 — Acceptance deadline missed; C04 — Provider or activity cancelled
Appeal	P08 — Provider, certificate, certification, accreditation, membership, or relationship status was improperly considered

Payment controls

No one person may both approve eligibility and release payment without a documented secondary review. Before payment, finance confirms the applicant name, provider identity, approved activity, approved expense, approved amount, invoice, payment instructions, refund requirement, remaining fund balance, and absence of an unresolved conflict.

Restricted payment made for the benefit of [Participant] through the IAESDP Interim ESD Participant Access Awards Program. This payment does not constitute IAESDP approval, accreditation, recognition, sponsorship, recommendation, or endorsement of the provider, instructor, curriculum, certificate, certification, or educational program.

Appeal workflow

1. Appeal received and date recorded.
2. Receipt acknowledged within three business days.
3. Original administrator prepares the administrative record but does not decide the appeal.
4. Conflict check completed for the appeal reviewer.
5. Reviewer identifies whether an authorized appeal ground has been stated.
6. Reviewer examines the application, timestamp, checklist, correspondence, decision reason, and published rules.
7. Reviewer may request narrowly relevant information.
8. Written decision issued within 15 business days when practicable.
9. Any correction is entered in the audit log.
10. A successful appeal after fund exhaustion receives priority for the next legally available funding unless a reserve can cover the award.
11. Systemic failures are referred for corrective action.

Quarterly transparency record

Public report

- starting allocation;
- Participant Access Awards issued;
- funds remaining or carried forward;
- number of applications;
- number approved;
- number waitlisted;
- number administratively ineligible;
- number of appeals;
- number of successful appeals; and
- aggregate provider concentration.

Confidential internal report

- application-level decision log;
- timestamp audit log;
- conflict disclosures and recusals;
- payment and refund reconciliation;
- complaint log;
- accessibility requests;
- suspected fraud;
- policy exceptions;
- applicant and provider concentration patterns;
- concentration involving one provider, curriculum, certificate, or certification pathway;
- indications that a provider is using the program for recruitment or promotional advantage;
- provider claims of IAESDP approval or endorsement;
- overlap between award administrators and credentialing or accreditation decision-makers; and
- recommended corrective action.

9. Participant Access Awards — Supporting Copy

Provider-facing disclaimer

This payment is made solely for the benefit of the named participant through the IAESDP Interim ESD Participant Access Awards Program. It does not constitute IAESDP approval, accreditation, recognition, sponsorship, recommendation, or endorsement of the provider, instructor, curriculum, certificate, certification, or educational program. The provider may not represent the award as evidence of any such status.

Board-resolution purpose statement

The Board authorizes a temporary and limited ESD Participant Access Awards Program to address recurring economic barriers to participation in Empowerment Self Defense education and to support broader access, workforce development, and capacity across the ESD field. The program shall not operate as a member financial-aid benefit, provider subsidy, endorsement mechanism, or preferred pathway to IAESDP credentialing or accreditation. Awards shall be administered impartially for the benefit of eligible individual participants, without preference based on IAESDP membership, provider affiliation, accreditation status, certification status, or relationship to IAESDP. The Board intends to transfer the program to One World ESD Foundation as soon as the Foundation is legally established, appropriately tax-exempt, operationally capable, and adequately funded.

Recommended applicant attestation

I certify that the cost identified in this application presents a meaningful barrier to my participation. I selected the educational opportunity independently. I understand that a Participant Access Award does not constitute IAESDP approval, accreditation, recognition, sponsorship, recommendation, or endorsement of the provider or program; does not guarantee admission, completion, certification, credentialing, accreditation, or employment; applies only to the approved expense; may ordinarily be paid directly to the provider for my benefit; may not be transferred or converted to cash; and may be withdrawn or recovered if I provide materially inaccurate information or receive duplicate funding that I do not disclose. I agree to notify IAESDP promptly of cancellations, refunds, other funding, or material changes.

PART II — INTERIM ECONOMIC ACCESS FEE WAIVERS

Scope of Part II

Use this program only when IAESDP is reducing or waiving a fee that IAESDP itself controls. No cash is distributed, no outside provider is paid, and no substantive membership, credentialing, competence, ethics, assessment, or renewal requirement is altered.

10. IAESDP Interim Economic Access Fee Waiver Policy

Policy owner: [Position or department]

Approved by: IAESDP Board of Directors

Effective date: [Date]

Review date: [Date]

Interim period: Until the applicable access-support function is transferred to One World ESD Foundation or another legally appropriate administrator

1. Purpose

IAESDP recognizes that the cost of professional-association participation and credentialing may create barriers for individuals working in or entering the Empowerment Self Defense field.

The Interim Economic Access Fee Waiver Program permits IAESDP to waive or reduce certain fees that IAESDP itself charges when cost presents a meaningful barrier to access.

The program is intended to:

- reduce economic barriers to participation in the ESD professional community;
- support broader and more equitable access to IAESDP membership and credentialing;
- strengthen participation, professional standards, and capacity across the ESD field;
- prevent IAESDP's fee structure from becoming unnecessarily exclusionary; and
- provide a transparent and consistently administered process while One World ESD Foundation is being established.

The program is not intended to provide general financial assistance, personal relief, cash payments, charitable grants, reimbursements, compensation, or provider subsidies.

2. Nature of a fee waiver

An Economic Access Fee Waiver is a limited reduction or waiver of an eligible fee imposed by IAESDP.

A fee waiver:

- does not involve a cash payment to the applicant;
- is not a scholarship, grant, charitable award, reimbursement, loan, or financial-aid payment;
- cannot be transferred to another person;
- has no cash value;
- applies only to the approved IAESDP fee and period;
- does not cover unrelated costs or fees charged by outside organizations;
- does not create an entitlement to future waivers; and
- does not alter any substantive membership, credentialing, ethical, competence, or conduct requirement.

Unless separately authorized following legal review, a waiver applies only to fees controlled by IAESDP and does not require IAESDP to pay an outside vendor or third party on the applicant's behalf.

3. Interim Section 501(c)(6) administration

IAESDP is a Section 501(c)(6) professional association and not a Section 501(c)(3) charitable organization.

The program must therefore remain:

- limited and incidental to IAESDP's primary association-wide purposes;
- connected to reducing barriers affecting participation and standards across the ESD field;
- administered under objective and published criteria;
- separate from general personal financial relief;
- free from favoritism, donor direction, and improper private inurement;
- separately tracked as waived or reduced revenue; and
- subject to periodic Board review.

IAESDP will not characterize the program as charitable financial assistance. The Board may limit, suspend, or discontinue fee waivers based on legal, tax, financial, governance, or operational considerations.

4. Available waiver categories

A. Membership Access Dues Waiver

A Membership Access Dues Waiver reduces or waives an eligible IAESDP membership fee for an approved period.

The waiver:

- applies only to the approved membership dues;
- ordinarily lasts no longer than 12 months;
- does not provide cash or reimbursement;
- does not pay optional products, events, insurance, training, credentialing, accreditation, or other separately priced services;
- does not automatically renew; and
- does not affect the member's rights, responsibilities, standards of conduct, or membership status solely because the dues were waived, except where the governing documents expressly require otherwise.

A person receiving a dues waiver must comply with the same applicable membership requirements as other persons in the corresponding membership category.

B. Credentialing Access Fee Waiver

A Credentialing Access Fee Waiver reduces or waives an eligible fee imposed directly by IAESDP in connection with an IAESDP credential.

A Credentialing Access Fee Waiver may apply to fees identified in the applicable application announcement, such as an application fee; an examination or assessment fee controlled by IAESDP; an initial credential issuance fee; a renewal fee; or another specifically identified IAESDP credentialing fee.

A waiver of credentialing fees does not waive or modify:

- eligibility requirements;
- education or experience prerequisites;
- application documentation;
- examination or assessment requirements;
- passing standards;
- competency requirements;
- ethical obligations;
- continuing-competence requirements;
- renewal requirements;
- disciplinary standards;

- identity-verification requirements; or
- any other substantive requirement for earning or maintaining the credential.

Receiving, requesting, declining, or appealing a fee waiver may not affect the applicant's credentialing decision, examination score, assessment outcome, disciplinary status, or renewal determination.

5. Separation from credentialing decisions

Economic-access determinations and credentialing determinations are separate functions.

Accordingly:

1. A fee-waiver decision must be based only on the published Economic Access Fee Waiver criteria.
2. A credentialing decision must be based only on the applicable eligibility, assessment, competence, ethics, and certification requirements.
3. Examination scorers, assessors, credentialing reviewers, and disciplinary decision-makers will not be told that a candidate requested or received a fee waiver unless disclosure is strictly necessary for administrative processing, legal compliance, fraud review, or conflict management.
4. Receiving a fee waiver creates no presumption for or against competence.
5. A fee waiver cannot be conditioned on passing an assessment or earning a credential.
6. An unsuccessful credentialing outcome does not convert the waived fee into a debt unless the applicant obtained the waiver through material misrepresentation.
7. Financial or revenue pressure may not influence credentialing decisions.
8. Staff with a material conflict must recuse from the fee-waiver determination.

6. Eligibility

An applicant may qualify when:

- the eligible IAESDP fee presents a meaningful economic barrier;
- the applicant submits a complete request;
- the applicant provides the required self-attestation;
- the applicant has not exceeded the applicable waiver-frequency limit;
- the applicant is not disqualified by a conflict of interest;
- the requested fee falls within the categories available during the applicable period; and
- waiver capacity remains available.

IAESDP should ordinarily use a concise self-attestation rather than require extensive financial records.

IAESDP may request additional information when reasonably necessary to resolve inconsistent, incomplete, duplicate, or potentially fraudulent information.

7. Allocation and availability

Before each waiver period, IAESDP will publish or internally authorize:

- the membership and credentialing fees eligible for waiver;
- whether full and partial waivers are available;
- the maximum number or total standard value of waivers available;
- the opening and closing dates;
- any individual frequency limit;
- the applicable use period; and
- the current status: upcoming, open, waitlist only, or closed.

Because a fee waiver generally represents foregone IAESDP revenue rather than a distribution of cash, IAESDP will refer to waiver capacity, authorized waiver value, or number of available waivers rather than scholarship funds or financial-assistance funds.

8. Selection process

Complete and eligible applications will be processed on a first-completed, first-served basis while authorized waiver capacity remains available.

IAESDP will not rank applicants based on professional status; membership history; personal relationships; popularity; hardship narrative; provider affiliation; credentialing outcome; perceived future value to IAESDP; volunteer service; or willingness to promote IAESDP.

A minor, correctable omission may be corrected within five business days while preserving the original timestamp, provided the initial submission was made in good faith and was not materially incomplete.

9. Conflicts and ineligible decision-makers

Current Board members, officers, employees, and contractors may not approve their own waivers.

A decision-maker must recuse when the applicant is an immediate family or household member; a person whom the decision-maker supervises; a close business partner; a person with whom the decision-maker has a material financial relationship; or someone whose approval or denial could materially benefit the decision-maker.

IAESDP may establish additional exclusions during the interim administration period.

10. Decision and activation

Applicants will receive a written decision stating whether the request was approved, partially approved, waitlisted, or denied; the fee and amount waived; the period during which the waiver must be used; any conditions or deadlines; a neutral reason for denial or waitlisting; and instructions for clarification or appeal.

An approved waiver will ordinarily be applied directly to the applicant's IAESDP account, invoice, application, or renewal balance. No cash, check, gift card, reimbursement, or transferable credit will be issued.

11. Appeals

An applicant may appeal when they believe IAESDP relied on a material factual error; applied the published criteria incorrectly; recorded the application timestamp incorrectly; overlooked required information submitted on time; failed to follow a required procedure; allowed an undisclosed conflict to affect the determination; or failed to provide an approved accessibility procedure.

An appeal may not be based solely on exhaustion of waiver capacity; disagreement with the amount of available waivers; a request to waive substantive membership or credentialing requirements; an applicant's failure to meet a published deadline; or dissatisfaction with a credentialing decision.

Appeals must be filed within 10 business days and reviewed by a person who did not make the initial determination.

12. Confidentiality

Economic-access information will be kept separate from substantive membership and credentialing decision records to the greatest extent reasonably possible.

Information may be shared only with personnel responsible for fee-waiver administration; finance and account adjustment; appeals; fraud or conflict review; legal or accounting compliance; or another function requiring the information by law.

IAESDP will not publicly identify a waiver recipient without affirmative consent.

13. Tracking and transparency

IAESDP will maintain records showing the standard fee; the amount waived or reduced; the date and category of the waiver; the applicable waiver period; the decision basis; any conflict disclosure; the applicant's acceptance or use of the waiver; and any appeal and resolution.

Aggregate reporting may include the number of waiver requests; number approved; number partially approved; number waitlisted or denied; total standard value of waived membership dues; total standard value of waived credentialing fees; and general appeal outcomes.

Waived amounts will be recorded as fee reductions or foregone revenue in consultation with IAESDP's accountant, rather than as cash scholarships paid to individuals.

14. Transition to One World ESD Foundation

IAESDP intends to transfer appropriate economic-access support functions to One World ESD Foundation once the Foundation is legally established, appropriately tax-exempt, operationally capable, and funded.

The transition may change the mechanism from an IAESDP fee waiver to independently administered Foundation support.

Any future Foundation support for IAESDP membership or credentialing must preserve independent Foundation selection; absence of donor control; credentialing impartiality; separation from competence and certification decisions; transparent eligibility rules; and appropriate agreements between IAESDP and the Foundation.

Until such a transition occurs, IAESDP will administer only the limited fee-waiver mechanism authorized under this policy.

11. Membership Access Dues Waiver — Website Copy

Membership Access Dues Waivers

IAESDP is committed to making professional-association participation reasonably accessible across the Empowerment Self Defense field.

When the cost of membership presents a meaningful barrier, an eligible applicant may request a full or partial Membership Access Dues Waiver.

A dues waiver is a limited reduction of an IAESDP membership charge. It is not a scholarship, cash grant, reimbursement, charitable payment, or general financial-assistance benefit.

What a waiver covers

A waiver may apply to eligible IAESDP membership dues for the approved period.

It does not ordinarily cover credentialing fees; accreditation fees; training or education fees; conference or event registration; insurance; products or merchandise; outside-provider expenses; or cash reimbursement for dues already paid.

Membership rights and responsibilities

Receiving a dues waiver does not reduce a member's standing or dignity within IAESDP. Approved members remain subject to the same applicable membership requirements, professional conduct expectations, voting or participation rules, policies, and responsibilities as other members in the corresponding membership category.

How decisions are made

Complete and eligible requests are processed on a first-completed, first-served basis while the published waiver capacity remains available. IAESDP does not rank hardship stories or give preference based on personal relationships, professional visibility, volunteer service, or perceived future value to the association.

- Current status: [Upcoming/Open/Waitlist/Closed]
- Available waiver capacity: [Number or total value]
- Application period: [Dates]
- Waiver period: [Dates]
- Apply: [Link]

12. Credentialing Access Fee Waiver — Website and Candidate Handbook Copy

Credentialing Access Fee Waivers

IAESDP seeks to ensure that its fee structure does not create an unnecessary economic barrier to qualified credentialing candidates.

An eligible candidate may request a full or partial Credentialing Access Fee Waiver for an identified IAESDP credentialing fee.

A Credentialing Access Fee Waiver is a reduction or waiver of a fee charged by IAESDP. It is not a scholarship, cash payment, reimbursement, charitable grant, or guarantee of credentialing success.

A fee waiver does not waive credentialing requirements

Receiving a fee waiver does not alter or waive any requirement concerning candidate eligibility; education or experience; documentation; assessment or examination; passing scores; demonstrated competence; ethical conduct; continuing competence; renewal; disciplinary review; or maintenance of the credential.

All candidates are evaluated under the same substantive credentialing standards regardless of whether they paid the full fee, received a partial waiver, or received a full waiver.

Independence of decisions

Fee-waiver decisions are made separately from credentialing decisions. Requesting, receiving, declining, or appealing a fee waiver will not affect application eligibility, examination scoring, assessment results, certification decisions, renewal decisions, or disciplinary outcomes. Credentialing evaluators and examination scorers will not ordinarily receive information about a candidate's fee-waiver status.

Available waivers

- Current status: [Upcoming/Open/Waitlist/Closed]
- Eligible fees: [List]
- Available waiver capacity: [Number or total standard value]
- Application period: [Dates]
- Use deadline: [Date]
- Apply: [Link]

13. Fee Waivers — Supporting Copy

Short universal explanation

Economic Access Fee Waivers: IAESDP may waive or reduce certain IAESDP-controlled membership or credentialing fees when cost presents a meaningful barrier to access. A fee waiver is an adjustment of an IAESDP charge; it is not a scholarship, cash grant, reimbursement, charitable award, or financial-assistance payment. Waivers do not alter membership responsibilities or any substantive credentialing, competency, ethics, assessment, or renewal requirement.

Economic Access Fee Waiver applicant attestation

I certify that the IAESDP fee identified in this application presents a meaningful economic barrier to my participation. I understand that the information I have provided is accurate and complete; IAESDP may request limited additional information when reasonably necessary to verify eligibility or prevent duplicate or fraudulent requests; a fee waiver applies only to the approved IAESDP fee; the waiver has no cash value and cannot be transferred or reimbursed; the waiver does not cover outside-provider costs unless expressly stated; membership and credentialing requirements remain unchanged; requesting or receiving a credentialing fee waiver will not affect the substantive credentialing decision; and approval is subject to published eligibility requirements and available waiver capacity.

Board clarification of prior terminology

The Board acknowledges that IAESDP has previously used terms including “financial assistance,” “scholarship,” “free membership,” and “credentialing scholarship” to describe instances in which IAESDP reduced or waived fees that it otherwise would have charged. The Board clarifies that, where no cash or property was distributed to the recipient and no outside-provider expense was paid, those actions constituted reductions or waivers of IAESDP-controlled fees rather than cash scholarships or general financial-assistance payments. Effective [date], IAESDP will describe and administer these arrangements as Membership Access Dues Waivers or Credentialing Access Fee Waivers under the Interim Economic Access Fee Waiver Policy. This clarification does not alter historical accounting entries. IAESDP will consult its accountant and nonprofit legal counsel regarding any required financial-statement, tax, governance, or recordkeeping treatment.

Boundary table for common costs

Cost	Interim treatment
IAESDP annual membership dues	Membership Access Dues Waiver
IAESDP credential application fee	Credentialing Access Fee Waiver
IAESDP credential renewal fee	Credentialing Access Fee Waiver
Fee retained entirely by an outside testing vendor	Do not cover under the fee-waiver policy without separate counsel review
Outside ESD education-provider tuition	Participant Access Award
Travel, lodging, equipment, wages	Not a fee waiver; eligible only if specifically authorized under a separately reviewed Participant Access Award cycle
Reimbursement for an IAESDP fee already paid	Ordinarily prohibited
IAESDP accreditation fee charged to an organization	Exclude for now; requires separate organizational-access and impartiality analysis

PART III — TRANSITION TO ONE WORLD ESD FOUNDATION

14. Transition Principles

The long-term objective is to move charitable participant support to One World ESD Foundation. The move should not be treated as a simple renaming exercise. The Foundation will be a separate legal entity with its own fiduciary duties, charitable purposes, tax rules, selection responsibilities, financial records, and data obligations.

14.1 Conditions that should be satisfied before transfer

1. One World ESD Foundation is legally formed and has received appropriate federal and state tax-exempt status or is operating through an approved fiscal sponsor.
2. The Foundation Board adopts its own scholarship and access policies.
3. The Foundation has sufficient funds, banking, accounting, insurance, records-retention, privacy, and grant-administration capacity.
4. IAESDP and One World execute written agreements governing services, data, branding, referrals, shared staff, cost allocation, and conflict management.
5. Donor restrictions and transfer authority are reviewed before any funds move.
6. Pending applicants, waitlisted applicants, approved recipients, refunds, and appeals are assigned clearly.
7. The Foundation's recipient-selection process is independent from IAESDP credentialing and accreditation decisions.
8. Public communications identify the correct legal administrator and charitable-deduction status.

14.2 Special caution when One World pays IAESDP fees

One World's future payment of IAESDP membership or credentialing fees would transfer money from a Section 501(c)(3) affiliate to a Section 501(c)(6) affiliate. That may be possible when it advances a valid charitable purpose and is independently administered, but it requires a separate affiliate-transaction, private-benefit, grant-control, and credentialing-impartiality analysis. One World should not simply reimburse IAESDP for waivers or allow IAESDP to select recipients without a written, counsel-reviewed structure.

14.3 Transition checklist

Workstream	Required deliverable
Governance	Resolutions from both Boards; conflict disclosures; delegated authorities
Legal	Tax-exempt status; transfer or services agreement; donor-restriction analysis; state charitable compliance
Finance	Bank accounts; chart of accounts; opening balances; restricted-fund schedule; payment and refund procedures
Programs	Successor policies; forms; selection criteria; appeals; accessibility; fraud controls
Credentialing firewall	Independent selection; restricted data access; no influence on scoring, eligibility, discipline, or accreditation
Data and privacy	Consent, data-sharing agreement, retention periods, security, access rights, applicant notice
Communications	Website notices, donor language, applicant notices, provider

Workstream	Required deliverable
	notices, FAQs
Operations	Staffing, training, systems, service levels, and incident response

14.4 Transfer acceptance record

Before the transfer is announced or funds and applicant records are moved, the executive leads for both organizations should approve a dated handoff memorandum confirming the following:

- The legal administrator, effective date, and authority for the transfer are identified.
- Cash balances, restrictions, outstanding commitments, refunds, and accounting records are reconciled.
- Pending applications, waitlists, approved awards, fee-waiver matters, complaints, and appeals are assigned.
- Applicant, recipient, provider, donor, and public notices have been approved and scheduled.
- Credentialing and accreditation firewalls, data permissions, privacy controls, and conflict procedures have been tested.
- Responsible staff, service expectations, incident-escalation contacts, and post-transfer reporting duties are documented.

The program should not be treated as transferred until the handoff memorandum is complete, approved, and retained with the governing records of both organizations.

APPENDIX A — TERMINOLOGY REPLACEMENT MATRIX

Current or historical phrase	Replace with	Context
Financial assistance for outside training	Participant Access Award	Outside-provider educational expense
Scholarship fund	Participant Access Awards Program funds / quarterly allocation	Interim IAESDP administration
Training scholarship	Participant Access Award	Use plain-language “participant scholarship” only as a secondary explanation
Free membership	Membership Access Dues Waiver	IAESDP dues reduction
Membership scholarship	Membership Access Dues Waiver	IAESDP dues reduction
Credentialing scholarship	Credentialing Access Fee Waiver	IAESDP-controlled credentialing fee
Free credentialing	Full Credentialing Access Fee Waiver	Never imply substantive requirements are waived
Financial-aid budget	Authorized waiver value / Participant Access Awards allocation	Accounting and Board materials
Scholarship recipient	Participant Access Award recipient	Outside education
Aid recipient	Fee-waiver recipient	IAESDP fee adjustment
IAESDP-sponsored training	Participant-selected educational opportunity	Avoid provider endorsement
IAESDP-approved provider for funding	Provider meeting administrative payment requirements	Administrative eligibility is not endorsement

APPENDIX B — BOARD ADOPTION CHECKLIST

- ☐ Counsel memorandum received and retained.
- ☐ Participant Access Awards Policy approved.
- ☐ Economic Access Fee Waiver Policy approved.
- ☐ Quarterly allocation and waiver capacity approved.
- ☐ Insider exclusions and conflict rules approved.
- ☐ Appeal reviewer appointed.
- ☐ Accounting codes established.
- ☐ Application forms and logs tested.
- ☐ Credentialing and accreditation firewalls documented.
- ☐ Website and handbook language updated.
- ☐ Historical terminology clarification adopted.
- ☐ Nondeductibility solicitation notice approved.
- ☐ One World transition responsibility assigned.
- ☐ Annual review date calendared.

APPENDIX C — OFFICIAL SOURCES AND LEGAL NOTES

Use of sources

These authorities support the structural analysis in this package. They do not constitute a legal opinion on IAESDP's particular facts. Revenue Ruling 67-251 should be addressed expressly by counsel before implementation.

1. **Internal Revenue Service.** Business Leagues. <https://www.irs.gov/charities-non-profits/other-non-profits/business-leagues> States that a business league must improve business conditions rather than perform particular services for individual persons.
2. **Internal Revenue Service.** Revenue Ruling 67-251, 1967-2 C.B. 196. <https://www.irs.gov/pub/irs-tege/rr67-251.pdf> Concludes that a business league providing financial aid and welfare services to members did not qualify under Section 501(c)(6) because earnings inured to private individuals.
3. **Institute for Credentialing Excellence.** ISO 17024 and NCCA Crosswalk and Suggested Documentation. <https://www.credentialingexcellence.org/Portals/0/Docs/Accreditation/ISO%2017024%20and%20NCCA%20crosswalk%20and%20suggested%20documentation.pdf> Includes impartiality controls, nonrequired association membership, and a fee structure that is not onerous.
4. **Internal Revenue Service.** Tax Treatment of Donations: 501(c)(6) Organizations. <https://www.irs.gov/charities-non-profits/other-non-profits/tax-treatment-of-donations-501c6-organizations> Explains that contributions are not deductible as charitable contributions, although some payments may qualify as business expenses for the payer.
5. **Internal Revenue Service.** Solicitation Notice. <https://www.irs.gov/charities-non-profits/solicitation-notice> Explains the disclosure requirement for organizations not eligible to receive deductible charitable contributions.
6. **Internal Revenue Service.** Performing Particular Services — Business League. <https://www.irs.gov/charities-non-profits/other-non-profits/performing-particular-services-business-league-internal-revenue-code-section-501c6> Explains that performing particular services for members or others is not an exempt activity and may jeopardize exemption if primary.
7. **Institute for Credentialing Excellence.** NCCA Processes and Resources. <https://www.credentialingexcellence.org/Accreditation/Earn-Accreditation/NCCA/Processes-Resources> Identifies the NCCA Standards as nationally recognized requirements for certification-program governance and operations.

Reliance and professional review

This policy package should be reviewed against IAESDP's Articles of Incorporation, bylaws, IRS determination letter, Form 1024 materials, current Form 990 reporting, credentialing governance documents, accreditation policies, conflict-of-interest policy, document-retention policy, privacy policy, accounting practices, state registrations, and any donor restrictions. Counsel should advise whether a fiscal sponsor is preferable for Participant Access Awards during the remaining interim period.