

# UXPA International Financial Assistance Policy

APPROVED BY BOARD | EFFECTIVE- September 11, 2026

## 1. Purpose

UXPA International is committed to supporting access to professional development, education, networking, and community engagement opportunities while maintaining the financial sustainability of the organization.

This policy establishes a consistent framework for considering requests for financial assistance from UXPA International members in good standing who are experiencing unemployment, underemployment, or other significant financial hardship when the standard cost of a UXPA International paid offering presents a meaningful barrier to participation.

## 2. Scope

This policy applies to UXPA International paid offerings, including conferences, courses, workshops, programs, events, webinars, and other activities for which UXPA International charges a participation or registration fee. Financial assistance under this policy is available only to current UXPA International members in good standing.

This policy applies specifically to assistance provided because of an individual's financial circumstances. It does not govern standard or role based pricing and discounts, including member, student, speaker, volunteer, early registration, group, partner, chapter, or promotional discounts.

## 3. Policy Statement

UXPA International may, at its discretion, provide financial assistance to a current member in good standing who would otherwise be unable to participate, or would face a significant barrier to participation, in a paid offering because of financial hardship.

Financial assistance is intended to reduce barriers to participation while preserving UXPA International's ability to responsibly manage the costs and financial sustainability of its programs and activities. The process is trust-based and does not require formal documentation of a member's financial circumstances.

Financial assistance is not guaranteed and does not create an entitlement to discounted or complimentary participation. A member may receive financial assistance under this policy no more than once per calendar year. Requests are subject to eligibility, available funding, capacity, timing, budget considerations, and approval under this policy.

## 4. Financial Assistance

UXPA International may approve financial assistance in the form of a partial discount or a full fee waiver, covering up to 100% of the applicable fee.

The level of assistance may vary based on the cost of the offering, available budget or funding, capacity, timing, and overall financial sustainability. A partial or full fee waiver is not guaranteed.

## 5. Eligibility

Financial assistance may be considered for members who:

- Are current UXPA International members in good standing at the time of the request
- Meet the normal eligibility requirements of the applicable UXPA International offering
- Are unemployed, underemployed, or experiencing another significant financial hardship
- Indicate that the applicable standard fee presents a meaningful barrier to participation

- Have not received financial assistance under this policy during the current calendar year
- Submit the request before completing registration or payment

Requests are trust-based and rely on the member's self-attestation. No formal documentation of unemployment, employment status, income, or other financial circumstances is required. The request form may ask the member to confirm that the applicable fee presents a meaningful financial barrier to participation.

## 6. Availability and Funding

Financial assistance is subject to the financial circumstances and capacity of the applicable paid offering. UXPA International may:

- Limit the number of financial assistance approvals available
- Establish an annual or offering specific budget or funding limit for financial assistance
- Offer a lower level of assistance than requested
- Suspend financial assistance for a particular offering when budget or capacity constraints require it

UXPA International may communicate the availability of financial assistance through its website, newsletter, and other member communications. Availability of assistance for one UXPA International offering does not guarantee availability for another.

## 7. Request and Approval Process

1. **Request.** The member submits the designated Financial Assistance Request Form before registering or paying for the applicable offering.
2. **Eligibility Check.** UXPA International confirms that the requester is a current member in good standing and has not received financial assistance during the current calendar year.
3. **Review.** A designated staff member, program or event lead, or other approver reviews the applicable fee, available budget or funding, capacity, timing, and the financial impact of providing assistance. No supporting financial documentation is required.
4. **Determination.** The designated approver may deny the request or approve a partial discount or full fee waiver, provided the decision falls within the budget, limits, and approval authority established under this policy.
5. **Communication.** If approved, the member is provided with the appropriate discount code, fee waiver, or other method necessary to complete registration or enrollment.
6. **Recordkeeping.** The request and outcome are recorded internally for financial tracking, enforcement of the annual frequency limit, consistency, and future policy review.

The UXPA International Board establishes the overall financial assistance budget and approval authority. Individual requests may be handled by designated staff or leadership within those Board-established limits. Requests that exceed established limits or present unusual circumstances should be escalated to the Board or other leadership specifically authorized by the Board.

## 8. Decision Criteria

When evaluating a request, UXPA International may consider:

- Whether the requester is a current UXPA International member in good standing
- Whether the member has already received financial assistance during the current calendar year
- The member's self-attestation that the applicable fee presents a meaningful financial barrier to participation
- The cost of delivering the applicable offering
- Available budget or financial assistance funding
- Current registration, enrollment, or participation levels and available capacity

- The number and value of other financial assistance requests already approved
- Sponsorship or other funding available to support participation
- Timing of the request
- Overall financial sustainability

## 9. Confidentiality

Requests for financial assistance should be handled respectfully and confidentially. Information provided by a member through the request form regarding financial or employment circumstances should be used only for administering the request and should not be broadly distributed.

## 10. Limitations

Financial assistance is discretionary and is not guaranteed. UXPA International reserves the right to deny any request or approve a level of assistance different from the amount requested.

Unless specifically approved as an exception:

- Financial assistance may not be combined with other discounts in a manner that exceeds the approved level of assistance
- Financial assistance does not apply retroactively after a member has completed payment
- A member may receive financial assistance no more than once per calendar year
- Approval for one UXPA International offering does not guarantee assistance or a particular assistance amount for a future offering
- Financial assistance has no cash value and may not be transferred to another individual

## 11. Administration and Policy Review

The UXPA International Board establishes the annual financial assistance budget, offering-specific limits when appropriate, and overall approval authority. UXPA International leadership may establish reasonable administrative procedures and delegated approval authority consistent with those Board-established limits.

The UXPA International Board should periodically review this policy and may revise the assistance levels, annual frequency limit, approval authority, eligibility criteria, or other provisions as the organization's programs and financial circumstances evolve.

\*\*For questions, comments, or feedback regarding this policy, please contact [finance@uxpa.org](mailto:finance@uxpa.org)