

AMERICAN SOCIETY FOR TRAINERS AND COACHES

Registered in the State of New York, United States

AFFILIATION HANDBOOK

Institutional Accreditation and Partnership: Streams, Criteria, Fees, Marks, Application and Governance

Affiliation streams:

Institutional Accreditation • Training Provider Accreditation
Corporate Partnership • Academic Partnership

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PART I

Foundations

What ASTC recognizes at the institutional level, how accreditation differs from partnership, and who decides.

1. Purpose, Scope and Standing

1.1 Purpose

This Handbook is the controlling document for institutional affiliation with the American Society for Trainers and Coaches (ASTC): the accreditation of organizations and the formation of institutional partnerships. It defines the affiliation streams, the criteria for each, the fees, the marks each confers, and the procedures for application, monitoring, renewal, and withdrawal.

Individual membership, Individual trainer and coach credentials are is governed by the separate Handbook. Accreditation of individual programs is governed by the Program Accreditation Standard. Where any promotional page or website summary conflicts with this Handbook, this Handbook governs on matters of institutional affiliation.

1.2 The Four Registers

ASTC recognizes four different things and maintains a separate public register for each. Institutional affiliation sits on the third. Understanding which register a recognition sits on resolves most of the confusion applicants encounter, and it is the reason a member, a credential holder, an accredited institution, and an accredited program are verified through four different services.

Register	Recognizes	Basis of the Decision
Member Register	A person	Verified eligibility — qualifications, experience, ethical undertaking.
Credential Register	A person	Assessed competence — observed practice, portfolio, examination.
Affiliate Centre Register	An organization	Assessed institutional or delivery quality, or an executed partnership agreement. Governed by this Handbook.
Program Register	A program	Assessed curriculum, assessment design, and outcomes for one named program.

1.3 Two Distinctions That Govern Everything in This Handbook

ACCREDITATION IS NOT PARTNERSHIP

Two of the four streams — Institutional Accreditation and Training Provider Accreditation — are quality judgments reached through assessment against published criteria. The other two — Corporate and Academic Partnership — are commercial collaborations reached through negotiation. A partner has not been assessed and must not present partnership as a quality endorsement. This distinction is enforced in the marks each stream may use and is the reason the two families are assessed by different routes.

AFFILIATION IS NOT PROGRAM APPROVAL

An accredited institution is not thereby delivering accredited programs. Institutional Accreditation judges governance and systems; Program Accreditation judges one named program. An institution may hold the former and have no accredited programs at all. Affiliates must not imply otherwise in marketing to learners. See Section 6.

1.4 Governance

Body	Authority in Affiliation Matters
Council	Approves this Handbook and the fee schedule; approves institutional accreditation and its withdrawal; hears final appeals.
Affiliation Board	Assesses institutional applications; appoints assessment panels; recommends accreditation, conditions, or refusal; approves partnership agreements.
Assessment Panels	Conduct documentary review and the assessment visit; score against the stream criteria; recommend an outcome.
Registrar	Maintains the Affiliate Centre Register; issues certificates and mark licences; administers annual returns, renewals, and withdrawal.
Ethics and Conduct Committee	Investigates complaints against affiliates; recommends sanction.
Appeals Board	Reviews appeals against refusal, conditions, or withdrawal, independently of the original decision-maker.

The Affiliation Board is functionally separate from ASTC's commercial and delivery functions. No assessor may assess an organization with which they have a current or recent employment, ownership, consulting, or family relationship, and conflict declarations are mandatory for every assessment.

1.5 Nondiscrimination and Fair Dealing

ASTC assesses organizations solely on the criteria in this Handbook, without regard to the nationality, ownership demographics, or religious or political character of the applicant, except where these bear directly on lawful operation or on the ability to meet the criteria. Assessment decisions are based on evidence, are given in writing with reasons, and are subject to appeal.

PART II

The Affiliation Streams

Four streams: architecture, the accreditation-versus-partnership divide, and the full specification of each.

2. Affiliation Architecture

ASTC works with training institutions, corporate organizations, universities, government agencies and professional bodies through four distinct streams. Two are accreditations — quality judgments reached through assessment against published criteria. Two are partnerships — commercial collaborations reached through negotiation. The difference is not cosmetic and is enforced in the marks each stream may use.

Stream	Type	Who It Is For	Term	Mark Granted
Institutional Accreditation	Accreditation	Institutions and academies	2 years	ASTC Accredited Institution
Training Provider Accreditation	Accreditation	Organizations that deliver ASTC-aligned certification and professional development programs	2 years	ASTC Authorized Training Provider
Corporate Partnership	Partnership	Corporate Organization, Government Agencies, Professional Bodies	2 years	ASTC Corporate Partner
Academic Partnership	Partnership	Business School, College, Universities	2 years	ASTC Academic Partner

2.1 Accreditation vs Partnership

	Accreditation	Partnership
Basis of decision	Assessment against published criteria	Negotiated agreement and due diligence
Outcome can be refused on quality	Yes	No — declined on fit or risk, not quality
Assessment visit	Yes	No
Implies a quality judgment	Yes	No
May be marketed to learners as a quality signal	Yes, within the limits of Section 6	No
Conditions may be imposed	Yes	Terms are contractual, not conditional
Streams	Institutional Accreditation; Training Provider Accreditation	Corporate Partnership; Academic Partnership

An organization may hold more than one stream. A university, for example, might hold an Academic Partnership and separately obtain Institutional Accreditation for its executive education arm. Each recognition is assessed, granted, and displayed independently.

3. Stream Specifications

3.1 Institutional Accreditation

ACCREDITATION • Term: 2 years • Mark: ASTC Accredited Institution

Who It Is For

Training institutions, academies, professional schools, and colleges that deliver learning as their principal business.

What It Recognizes

Recognizes organizations that demonstrate excellence in governance, learning quality, assessment integrity, ethical compliance, and professional development capability. It is a whole-of-institution judgment, not a judgment about any single program.

Assessment Domains

Domain	What Is Examined
1. Organizational Governance and Leadership	Legal standing; board or ownership structure; strategic planning; financial viability; conflict-of-interest policy
2. Academic and Learning Governance	Curriculum approval process; academic authority; program review cycle; standards oversight
3. Faculty Qualification Standards	Trainer and faculty credentials; recruitment and vetting; ongoing development; performance review
4. Curriculum and Competency Alignment	Mapping to competency frameworks; learning outcome design; currency of content
5. Assessment Quality Systems	Assessment design; moderation; inter-rater reliability; academic integrity and malpractice policy
6. Learner Protection Policies	Enrollment terms; refund and cancellation; grievance and appeal; safeguarding; continuity if the institution ceases trading
7. Data Privacy and Compliance	Learner data handling; retention and destruction; regulatory compliance in each jurisdiction of operation
8. Continuous Improvement Mechanisms	Feedback collection and action; self-evaluation; management review; improvement tracking

Method

Self-assessment against the eight domains; documentary review; virtual or on-site assessment visit; panel decision; conditions where required.

What Recognition Grants

- Formal recognition as an ASTC-approved professional education provider.
- Listing on the Affiliate Centre Register with public verification.
- Use of the "ASTC Accredited Institution" mark for the accreditation period.
- Eligibility to submit programs for separate Program Accreditation.

Term and Maintenance

2 years, with an annual return and a mid-term desk review at 18 months. Renewal requires a current annual return, evidence that the criteria continue to be met, confirmation of continued adherence to the Code of Ethics, and payment of the annual recognition fee.

3.2 Training Provider Accreditation

ACCREDITATION • Term: 2 years • Mark: ASTC Authorized Training Provider

Who It Is For

Organizations that deliver ASTC-aligned certification and professional development programs, including consultancies and corporate learning functions delivering to third parties.

What It Recognizes

Validates the provider's capability to deliver ASTC-aligned programs to standard. Narrower than Institutional Accreditation and focused on delivery capability rather than institutional governance.

Assessment Domains

Domain	What Is Examined
1. Trainer Qualification and Competency	Credentials of delivering trainers; ASTC designation held; currency of practice
2. Instructional Quality Assurance	Session observation; standardization across trainers; materials control
3. Learning Infrastructure and Technology	Venues and virtual platforms; LMS; accessibility; technical support
4. Assessment Integrity	Secure assessment administration; identity verification; result handling
5. Learner Experience Standards	Pre-program information; support during delivery; feedback and outcomes
6. Complaint Handling Processes	Published procedure; timelines; escalation to ASTC; record of resolutions
7. CPD Compliance Systems	Tracking of trainer CPD; provision of CPD to learners; record accuracy
8. Reporting and Documentation Standards	Cohort reporting to ASTC; attendance and result records; document retention

Method

Self-assessment; documentary review; observation of at least one delivered session; trainer credential verification; panel decision.

What Recognition Grants

- Authority to deliver ASTC-authorized programs.
- Use of the "ASTC Authorized Training Provider" mark for the accreditation period.
- Listing on the Affiliate Centre Register with public verification.
- Access to ASTC program materials and assessor support under licence.

Term and Maintenance

2 years, with an annual return. Renewal requires a current annual return, evidence that the criteria continue to be met, confirmation of continued adherence to the Code of Ethics, and payment of the annual recognition fee.

3.3 Corporate Partnership

PARTNERSHIP • Term: 2 years • Mark: ASTC Corporate Partner

Who It Is For

Employers building internal workforce capability, whose learning is delivered to their own staff rather than sold externally.

What It Recognizes

A collaboration agreement, not an accreditation. It gives an employer structured access to ASTC frameworks, certification pathways, and assessment for its own workforce.

Scope of Collaboration

Area	What It Covers
Corporate certification pathways	Structured routes for staff to obtain ASTC credentials
Customized workforce programs	Programs built on ASTC competency frameworks for the partner's context
Leadership development frameworks	Framework design and benchmarking for the partner's leadership population
Talent capability assessments	Assessment of internal capability against ASTC standards
Learning strategy consulting	Advisory support on learning architecture and measurement
Employer recognition programs	Public recognition of employers meeting defined development standards
Workforce analytics collaboration	Shared analysis of capability data, subject to data agreement

Method

Application and due diligence; scoping discussion; partnership agreement executed by both parties. No assessment visit.

What Recognition Grants

- Use of the "ASTC Corporate Partner" mark for the partnership term.
- Preferential rates on credential assessment for enrolled staff.
- Named account contact and annual partnership review.
- Listing on the Corporate Partner directory.

Term and Maintenance

2 years, renewable, or as set in the partnership agreement. Renewal requires a current annual return, evidence that the criteria continue to be met, confirmation of continued adherence to the Code of Ethics, and payment of the annual recognition fee.

3.4 Academic Partnership

PARTNERSHIP • Term: 2 years • Mark: ASTC Academic Partner

Who It Is For

Universities, colleges, and academic research centers.

What It Recognizes

A collaboration agreement aligning professional education with workforce needs. Like Corporate Partnership, it is a partnership rather than an accreditation, and confers no judgment on the institution's academic quality.

Scope of Collaboration

Area	What It Covers
Curriculum co-development	Joint design of modules or programs aligned to ASTC frameworks
Credit articulation and pathways	Recognition of ASTC credentials toward academic credit, and the reverse
Research collaboration	Joint research on learning effectiveness, capability, and professional practice
Faculty development programs	ASTC credentialing pathways for teaching faculty
Joint certification initiatives	Co-badged programs, subject to separate Program Accreditation
Academic quality benchmarking	Comparison of curricula against ASTC competency standards
Student employability programs	Student Affiliate membership, placements, and career pathways

Method

Application and due diligence; scoping discussion; memorandum of understanding executed by both parties.

What Recognition Grants

- Use of the "ASTC Academic Partner" mark for the partnership term.
- Student Affiliate membership pathway for enrolled students.
- Faculty access to ASTC credentialing at partner rates.
- Listing on the Academic Partner directory.

Term and Maintenance

2 years, renewable, or as set in the partnership agreement. Renewal requires a current annual return, evidence that the criteria continue to be met, confirmation of continued adherence to the Code of Ethics, and payment of the annual recognition fee.

PART III

Obligations and Marks

What every affiliate owes throughout the term, how the ASTC marks may and may not be used, and the sanctions for misuse.

4. Affiliate Obligations

Every affiliate, in every stream, undertakes to:

1. Maintain the criteria on which recognition was granted throughout the term, not merely at the point of assessment.
2. Notify ASTC within 30 days of any material change: change of ownership or control, insolvency or restructuring, cessation of a recognized activity, loss of a regulatory approval, or departure of the named accountable person.
3. Submit the annual return by the due date, including delivery volumes, learner outcomes, and complaint summary where applicable.
4. Handle learner complaints under a published procedure, and escalate to ASTC any complaint alleging breach of ASTC standards.
5. Permit ASTC to conduct an unannounced review where a substantiated complaint or material concern arises.
6. Use the granted mark only as permitted in Section 5, and cease use immediately on expiry, suspension, or withdrawal.
7. Ensure that individuals delivering under the affiliation hold the individual membership or credential the stream requires.

MAINTENANCE, NOT A SNAPSHOT

Accreditation certifies that an organization met the criteria on the day it was assessed and undertakes to keep meeting them. An affiliate that lets faculty credentials lapse, drops its complaints procedure, or quietly changes ownership has broken the accreditation even if its certificate still shows a future expiry date. The annual return and the unannounced-review power exist precisely because a two-year term cannot rest on a single visit.

5. Use of Affiliate Marks

Each stream confers one named mark, licensed for the term. The mark is the visible value of the affiliation, and its worth to every affiliate depends on no affiliate misusing it.

Permitted	Restricted	Prohibited
Use the granted mark on the organization's website, prospectus, and corporate material during the term.	Reference to accreditation must name the stream and term precisely.	Describing the organization as "ASTC certified" or "ASTC approved" without naming the stream.
State the accreditation term and expiry date.	Program-level claims require separate Program Accreditation.	Implying that all of the organization's programs are ASTC-accredited when they are not.
Link to the Affiliate Centre Register entry for verification.	Partnership marks may be used in corporate material only, not in learner-facing quality claims.	Presenting a partnership as an accreditation or quality endorsement.
State that named individual staff hold ASTC membership or credentials, where true.	Group or subsidiary use requires each entity to be separately recognized.	Issuing certificates bearing the ASTC mark for programs that are not ASTC-authorized.

THE CLAIM THAT CAUSES THE MOST DAMAGE

The most harmful misrepresentation in this area is an affiliate issuing its own course certificates bearing the ASTC mark, so that learners believe they hold an ASTC credential when they hold a certificate of attendance from a private provider. This misleads learners who have paid money, and it corrupts the Credential Register that every genuine credential holder relies on. It is grounds for immediate suspension of the affiliation.

6. Affiliation and Program Accreditation

The most common misunderstanding among affiliates and their learners is the belief that an accredited institution automatically delivers accredited programs. It does not, and the distinction is load-bearing.

	Institutional / Provider Accreditation	Program Accreditation
What is judged	The organization's governance, systems, and delivery capability	One named program's curriculum, assessment, and outcomes
Register	Affiliate Centre Register	Program Register
Governing document	This Handbook	Program Accreditation Standard
Can exist without the other	Yes — an accredited institution may run no accredited programs	Yes — a program may be accredited within a non-accredited provider only where ASTC permits

An affiliate may state that it is an ASTC Accredited Institution. It may state that a specific program is ASTC-accredited only where that program holds Program Accreditation. Conflating the two in learner-facing material is a mark misuse under Section 5 and a Code of Ethics matter.

PART IV

Fees and Process

What affiliation costs, the size banding behind it, and every step from expression of interest to award and monitoring.

7. Fees

7.1 Fee Structure

Institutional fees have two components: a one-time assessment fee covering the cost of the review, and an annual recognition fee covering register maintenance, monitoring, and use of the mark. Partnerships carry an agreement fee rather than an assessment fee, because no assessment is performed. All amounts are published in the ASTC Schedule of Fees, which forms part of this Handbook by reference.

Stream	Assessment / Agreement Fee	Annual Recognition Fee	Term
Institutional Accreditation	Band A: \$ 200 ; Band B: \$ 300 Band C: \$ 700 ; Band D: \$ 1000	Band A: \$ 100 ; Band B: \$ 200 Band C: \$ 400 ; Band D: \$ 600	2 years
Training Provider Accreditation	Band A: \$ 100 ; Band B: \$ 200 Band C: \$ 300 ; Band D: \$ 400	Band A: \$ 50 ; Band B: \$ 100 Band C: \$ 200 ; Band D: \$ 400	2 years
Corporate Partnership	\$ 300	\$ 100	2 years
Academic Partnership	\$ 200	\$ 100	2 years

7.2 Size Bands for Accreditation Streams

Accreditation fees are banded by the applicant's scale, measured by annual learner volume. This keeps assessment affordable for small independent providers while recovering the greater cost of assessing large multi-site institutions.

Band	Basis	Notes
Band A	Up to 200 learners enrolled annually	Small independent providers and consultancies
Band B	201 to 1,000 learners annually	Established regional providers
Band C	1,001 to 5,000 learners annually	National institutions and large corporate academies
Band D	Over 5,000 learners annually	By negotiation; multi-site assessment may be required

- Assessment fees cover assessor time and are payable whether or not accreditation is granted. This must be stated clearly to applicants before they commit, and is repeated in the application declaration.
- Where an assessment requires an on-site visit, reasonable travel and accommodation costs are charged at cost and are agreed in advance in writing.
- Multi-site organizations pay a reduced fee for each additional site assessed in the same cycle.
- Re-assessment following a conditions or refusal outcome is charged at 50% of the original assessment fee where undertaken within 12 months.

WHY THE ASSESSMENT FEE IS NON-CONTINGENT

Charging for assessment only on success would create a powerful incentive to pass weak applicants, because a refusal would mean unpaid work. Separating the assessment fee from the outcome removes that incentive and protects the integrity of the accreditation. Applicants are told this before they commit, so a refusal is disappointing but never a surprise.

7.3 Payment, Refunds and Terms

Circumstance	Position
Institution withdraws before assessors are appointed	Assessment fee refunded in full less an administration charge.
Institution withdraws after assessors appointed	Assessment fee retained in proportion to work performed.
Accreditation refused after assessment	Assessment fee retained. No annual recognition fee is taken.
Accreditation granted	Annual recognition fee invoiced. Recognition is effective on payment.
Affiliation suspended or withdrawn for conduct	No refund of any fee paid.
Partnership terminated by either party under the agreement	Handled under the termination terms of the partnership agreement.

- The accreditation term runs from the date of award. Recognition is not effective, and no mark may be used, until the annual recognition fee has cleared.
- Annual recognition fees are payable in advance for each year of the term.
- The ASTC Refund Policy published on the Society's website applies in addition. Where the two differ, the more favorable to the affiliate applies.

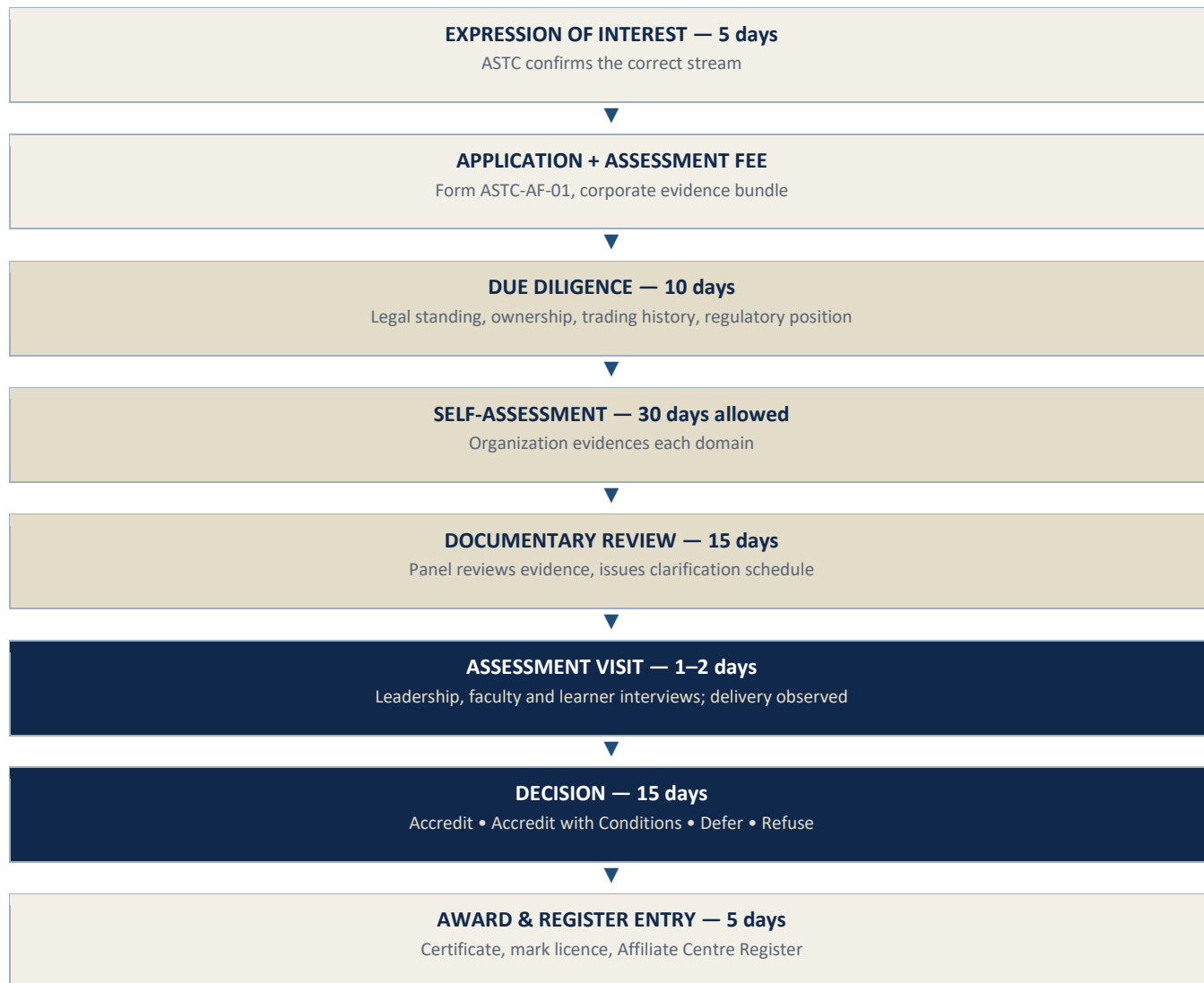
8. Affiliation Process

Accreditation streams follow the full eight-stage process below. Partnership streams complete stages 1 to 3 and then proceed directly to agreement drafting at stage 7. Service levels are stated in United States business days and run from receipt of a complete submission.

Stage	Activity	What Happens	Owner	Service Level
1	Expression of Interest	Organization submits an outline of its activity and the stream sought. ASTC confirms which stream fits.	Applicant	5 days
2	Application	Form ASTC-AF-01 submitted with the corporate evidence bundle and assessment fee.	Applicant	—
3	Due Diligence	Legal standing, ownership, trading history, and regulatory position verified.	Affiliation Board	10 days
4	Self-Assessment	Organization completes the self-assessment against the stream's domains with cross-referenced evidence.	Applicant	30 days allowed
5	Documentary Review	Assessment panel reviews the self-assessment and evidence; issues a clarification schedule.	Assessment Panel	15 days
6	Assessment Visit	Virtual or on-site visit; interviews with leadership, faculty, and learners; observation of delivery where applicable.	Assessment Panel	1–2 days on site
7	Decision	Accredit, accredit with conditions, defer, or refuse. Partnership streams: agreement drafted and executed.	Affiliation Board	15 days
8	Award and Register Entry	Certificate issued; Affiliate Centre Register entry created; mark licence issued for the term.	Registrar	5 days

Indicative duration: 3–4 months for accreditation streams, largely governed by how quickly the organization completes its self-assessment. 4–6 weeks for partnership streams.

8.1 Process Map — Accreditation Streams



Partnership streams exit after Due Diligence and proceed to agreement drafting and execution, without self-assessment, documentary review, or visit.

8.2 Decision Categories — Accreditation Streams

Decision	Meaning	Effect
Accredited	All domains met.	Full accreditation for the stream term. Annual return required.
Accredited with Conditions	Domains substantially met, with specific remediable gaps.	Accreditation granted; conditions stated with deadlines. Register shows the conditional status.
Deferred	Evidence insufficient to decide.	Specified evidence requested; decision held up to 6 months. No additional assessment fee.
Refused	Domains not met.	Written reasons given. Reapplication after 12 months at 50% of the assessment fee.

8.3 Mid-Term Monitoring

- An annual return is required in every year of the term, including the year of award.
- Institutional Accreditation carries a mid-term desk review at 18 months.
- ASTC may conduct an unannounced review at any time where a substantiated complaint or material concern arises.
- Failure to submit an annual return within 30 days of the due date results in suspension of the affiliation.

8.4 Renewal

Affiliations are renewed at the end of their term through a re-assessment, not a simple declaration. Re-assessment is proportionate: where the annual returns have been clean and no material change has occurred, the panel may accept a desk-based review in place of a further visit. An affiliation that expires without renewal is marked Expired on the register and the mark licence terminates immediately.

PART V

Governance

Complaints, sanctions, learner protection, the register and data.

9. Complaints, Sanctions and Learner Protection

9.1 Complaints Against Affiliates

Any person — including a learner, an employee of the affiliate, a competitor, or a member of the public — may lodge a complaint alleging that an affiliate has breached ASTC standards or misused an ASTC mark. Complaints are submitted in writing to the Ethics and Conduct Committee and must identify the complainant, the affiliate, and the conduct alleged. The affiliate is notified of the substance and given a reasonable opportunity to respond before any finding is made.

9.2 Sanctions

Sanction	When Applied	Shown on Register
Advisory	Minor or first breach, readily corrected.	No
Conditions imposed	Criteria partially unmet but remediable within a defined period.	Yes — Accredited with Conditions
Suspension	Serious breach, or pending investigation of a serious allegation. New enrollments must cease.	Yes — Suspended
Withdrawal	Grave or repeated breach; misrepresentation of the affiliation; harm to learners.	Yes — Withdrawn

9.3 Learner Protection on Suspension or Withdrawal

When an affiliation is suspended or withdrawn, the people most exposed are the learners who enrolled in good faith. ASTC will take reasonable steps to protect them:

- Assessment already completed by a learner toward an ASTC credential is recognized and is not lost.
- Where practicable, ASTC will arrange for enrolled learners to transfer to another affiliate to complete their program.
- The affiliate must inform its current learners of the change in status within a period ASTC specifies, in terms ASTC approves.
- The affiliate must not enroll new learners under the ASTC mark from the moment of suspension.

CONTINUITY IS A CONDITION, NOT A COURTESY

The learner-protection provisions in Institutional Accreditation Domain 6 are assessed at the point of accreditation precisely so that, if the worst happens, learners are not stranded. An affiliate that cannot show what would happen to its learners if it ceased trading has not met the criteria, however strong the rest of its case.

9.4 Appeals

An affiliate or applicant may appeal a refusal, conditions, suspension, or withdrawal on the grounds that the published procedure was not followed, that material evidence was overlooked, or that a conflict of interest affected the outcome. The appeal is submitted in writing within 30 days with the appeal fee and is heard by the Appeals Board, none of whom took part in the original decision. The Board issues a written determination within 30 business days: uphold, overturn, or substitute a different outcome. The appeal fee is refunded in full where the appeal succeeds. The determination is final within ASTC.

10. Register, Verification and Data

10.1 The Affiliate Centre Register

ASTC maintains a public Affiliate Centre Register. Learners, employers, and partner institutions may verify an affiliate through the Society's online verification service. Verification confirms only the following:

Field	Notes
Organization name	As held on the register, with trading name where different.
Stream and mark	Which affiliation is held — Institutional, Provider, Corporate, or Academic.
Status	Accredited, Accredited with Conditions, Suspended, Withdrawn, or Expired.
Term	Accreditation start and expiry dates.
Accredited programs	Programs on the Program Register held by this affiliate, listed individually.
Affiliate since	Date of first accreditation, where continuous.

Accredited affiliates may not opt out of the register, since public verifiability is the point of accreditation. The register does not show fee band, assessment scores, annual-return content, or complaint history other than current status.

10.2 Certificate and Mark Licence

Every accredited affiliate receives a certificate carrying a unique affiliate ID, a QR verification code linking to the register entry, and a mark licence specifying exactly which mark may be used, in what form, and for what period. The mark must be used only in the version issued, without alteration, and only while the affiliation is current.

10.3 Data Protection

- Affiliate data is used only for affiliation administration, verification, monitoring, and governance.
- Commercially sensitive material submitted in an application — accounts, learner data, internal policies — is used only for assessment and is not disclosed outside the assessment panel and the Board.
- Application materials are retained for six (6) years after the affiliation ends, then securely destroyed except for the minimum register data needed to verify that it existed.
- Affiliates may request access to, or correction of, their own records in writing at any time.
- Learner data submitted as assessment evidence must be provided in redacted or aggregate form wherever the assessment purpose allows; ASTC does not require learner-identifying data it does not need.

PART VI

Form

The institutional affiliation application, ASTC-AF-01, serving all four streams.

11. Institutional Affiliation — Form ASTC-AF-01

One form serves all four affiliation streams. Complete every section; Section D applies only to accreditation streams. Incomplete forms are returned without review.

Office use only — Application No.: _____ Received: _____ Stream confirmed: _____ Size band: _____

Section A — Organization

REGISTERED LEGAL NAME	TRADING NAME (IF DIFFERENT)
COUNTRY OF REGISTRATION	REGISTRATION / INCORPORATION NUMBER
REGISTERED ADDRESS	PRINCIPAL PLACE OF BUSINESS
YEAR ESTABLISHED	WEBSITE
OWNERSHIP / CONTROL STRUCTURE	OTHER SITES OR DELIVERY LOCATIONS

Section B — Stream Applied For

ACCREDITATION — ASSESSED ☐ Institutional Accreditation ☐ Training Provider Accreditation	PARTNERSHIP — BY AGREEMENT ☐ Corporate Partnership ☐ Academic Partnership
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Section C — Accountable Persons and Scale

NAMED ACCOUNTABLE OFFICER — NAME AND TITLE	EMAIL AND TELEPHONE
PRIMARY DAY-TO-DAY CONTACT	EMAIL AND TELEPHONE

LEARNERS ENROLLED PER YEAR	NUMBER OF TRAINERS OR FACULTY	OF WHOM ASTC-CREDENTIALLED	COUNTRIES OF DELIVERY
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Section D — Corporate Evidence Bundle

✓	Item	Required For
☐	Certificate of incorporation or equivalent legal standing	All streams



✓	Item	Required For
☐	Ownership and control structure statement	All streams
☐	Most recent audited or management accounts	Accreditation streams
☐	Organizational chart and governance structure	Accreditation streams
☐	Register of trainers or faculty with qualifications held	IA, TPA
☐	Curriculum or program inventory	IA, TPA
☐	Assessment policy and moderation procedure	IA, TPA
☐	Learner protection, refund, and continuity policy	IA
☐	Complaints and appeals procedure	IA, TPA
☐	Data privacy policy and retention schedule	All streams
☐	Continuous improvement or quality review evidence	IA, TPA
☐	Statement of the collaboration sought and expected outcomes	CP, AP
☐	Signed organizational undertaking to the Code of Ethics	All streams

Section E — Organizational Declarations

On behalf of the organization named in Section A, I declare that:

- All information in this application and its attachments is true, accurate, and complete.
- The organization is lawfully constituted, is not insolvent, and is not subject to any undisclosed regulatory action.
- I am authorized to bind the organization to this application and to any resulting agreement.
- The organization authorizes ASTC to verify any statement made, to contact the persons and bodies named, and to conduct an assessment visit.
- The organization undertakes to comply with the ASTC Code of Ethics and to require the same of all individuals delivering under the affiliation.
- The organization understands that affiliation is not accreditation of any individual program, and undertakes not to represent it as such.
- The organization understands that the assessment fee is payable whether or not recognition is granted.
- The organization undertakes to notify ASTC within 30 days of any material change as defined in Section 4.
- The organization undertakes to cease all use of any ASTC mark immediately on expiry, suspension, or withdrawal.
- The organization undertakes to protect enrolled learners in the event of suspension or withdrawal, as provided in Section 9.3.

AUTHORIZED SIGNATORY — SIGNATURE	PRINTED NAME AND TITLE	DATE (MM/DD/YYYY)
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For Office Use Only

DUE DILIGENCE COMPLETED / DATE	PANEL APPOINTED	VISIT DATE	DECISION
CONDITIONS IMPOSED	TERM GRANTED	MARK LICENCE ISSUED	REGISTER ENTRY NO.

PART VII

Appendices

Glossary, source reconciliation, related documents and version control.

Appendix A — Glossary

Term	Definition
Accreditation	A quality judgment about an organization, reached through assessment against published criteria. Institutional and Training Provider Accreditation are the two accreditation streams.
Affiliation	The general term for any institutional relationship with ASTC, covering both accreditations and partnerships.
Affiliate Centre Register	The public record of accredited institutions, authorized providers, and partners.
Annual return	The yearly report an affiliate submits confirming continued compliance and reporting delivery volumes and outcomes.
Assessment fee	The one-time fee covering the cost of assessing an accreditation application, payable whether or not accreditation is granted.
Mark	The named ASTC designation an affiliate is licensed to display — for example, "ASTC Accredited Institution."
Partnership	A negotiated commercial collaboration with an organization. Carries no quality judgment. Corporate and Academic Partnership are the two partnership streams.
Program Accreditation	Separate recognition of one named program, governed by the Program Accreditation Standard, sitting on the Program Register.
Recognition fee	The annual fee covering register maintenance, monitoring, and use of the mark for accreditation streams.
Size band	The scale category applied to an accreditation applicant, determined by annual learner volume.

Appendix B — Reconciliation of Published Sources

At the time of drafting, ASTC's affiliation page described four institutional streams in marketing terms but supplied no eligibility criteria, term, fee, process, or mark definition. This appendix records what was published and what this Handbook adds.

Item	Affiliation page stated	Position adopted
Streams	Four streams named: Institutional Accreditation, Training Provider Accreditation, Corporate Partnership, Academic Partnership	Retained as the four streams, with full specifications added
Criteria	Bulleted focus areas per stream, no thresholds	Formalized into assessment domains and scope-of-collaboration areas
Accreditation vs partnership	Not distinguished; all four presented together	Made explicit and enforced through the marks and assessment routes
Term and fee	None stated	Terms of 1–2 years and a two-part fee with size banding added
Process	None stated	Eight-stage process with service levels and a process map added
Marks	"Accredited providers can use ASTC branding" — no definition	Each stream confers one named mark, licensed with defined permitted and prohibited uses
Application form	Six fields: name, contact, email, country, message, two photos	Replaced by Form ASTC-AF-01 with corporate evidence and declarations

B.1 Corrections Required to Published Material

8. The partnership application form collects only name, contact, email, country, message, and two photographs — insufficient for any due diligence on an institutional applicant. Form ASTC-AF-01 replaces it.
9. The affiliation page states that accredited providers "can use ASTC branding" without defining the mark, its permitted uses, or its termination. Section 5 supplies these.
10. The four streams are presented together with no signal that two are assessed and two are negotiated. The page should group them as Accreditation and Partnership.
11. The site footer describes ASTC as dedicated to "future-readiness in the financial sector." This is incorrect boilerplate for a training and coaching body and appears on every page, including the affiliation page.
12. The navigation label and URL for trainer accreditation are misspelled as "Trainer."

WHY THIS MATTERS COMMERCIALY

Institutions perform more due diligence than individuals before committing money and reputation. An institution considering accreditation and finding a five-field contact form, no criteria, no fee, and no process will conclude that ASTC is not a serious accrediting body — and it will reach that conclusion faster than an individual would. The affiliation streams are potentially ASTC's highest-value product; they are currently its least documented.

Appendix C — Document Control

Version	Date	Author	Summary of Change
1.0	May 1, 2026	Affiliation Board	Initial issue. Establishes the four institutional affiliation streams with full specifications, the accreditation-versus-partnership distinction, size-banded fees, mark licensing rules, an eight-stage process, learner-protection provisions, and Form ASTC-AF-01. Supersedes the marketing-only affiliation content previously published on the website, and the Organizational Affiliate grade formerly proposed within the Membership Handbook.

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