

Policies & Procedures Manual

Master governance, conduct, safety, payment, documentation, and risk-management framework for VRI's online mentored research programs

Document status	Internal master document for counsel review and operational adoption
Prepared for	Virtual Research Institute LLC
Prepared date	April 05, 2026
Intended use	Working source document for downloadable PDF, website policy page, enrollment agreements, and mentor contractor documentation

Important note. This manual is designed to be comprehensive and professional, but it is not a substitute for counsel-reviewed enrollment agreements, contractor agreements, privacy notices, media releases, and jurisdiction-specific legal advice. Sections dealing with governing law, dispute resolution, background-check notices, intellectual-property enforcement, and worker classification should be finalized with qualified counsel before public deployment.

Contents

The section list below is intended as a readable navigation page for the master document. Final PDF or website deployments may use linked navigation and section-level anchors.

1. Purpose, scope, and document architecture	3
2. Definitions	3
3. Governance, authority, and companion documents	4
4. Program model, limitations, and no-guarantee disclosures	5
5. Eligibility, enrollment, and account accuracy	5
6. Student and parent / guardian roles and responsibilities	6
7. Mentor eligibility, vetting, and independent-contractor standards	7
8. Communications, platforms, recordings, and online-supervision controls	7
9. Scheduling, time zones, attendance, and participation	8
10. Academic integrity, research ethics, authorship, and deliverables	9
11. Professional conduct, prohibited behavior, and youth safety	9
12. Privacy, data handling, media releases, and archives	10
13. Payments, deposits, withdrawals, refunds, and chargebacks	11
14. Mentor compensation, invoices, taxes, benefits, and records	12
15. Incident reporting, interim measures, review procedures, and appeals	13
16. Intellectual property, branding, confidentiality, and anti-circumvention	14
17. Document control, amendment, severability, and review flags	14
Appendix A. Companion acknowledgments and operational checklists	15
Appendix B. Implementation roadmap	15

1. Purpose, scope, and document architecture

This Policies & Procedures Manual establishes the core governance, conduct, safety, financial, operational, and documentation framework for Virtual Research Institute LLC (“VRI”). It is designed for use in VRI’s online and hybrid mentored research offerings involving students, families, mentors, reviewers, contractors, guests, and administrative staff.

The document is intentionally drafted as a master policy manual rather than a simple website page. It is meant to serve as the source text for downloadable PDFs, public-facing web summaries, registration acknowledgments, contractor onboarding packets, internal standard operating procedures, and companion contracts.

Core principle. VRI’s policy posture is to protect the company first, maintain a safe and professionally run program second, and set clear expectations for students, families, mentors, and any other participant whose conduct or decisions may affect program quality, safety, confidentiality, or legal risk.

- This manual applies to VRI-sponsored meetings, chats, office hours, cohort sessions, mentor-student sessions, workshops, asynchronous collaboration spaces, presentation rehearsals, recorded events, and any project-related communication conducted through approved channels.
- This manual does not replace signed contracts. Enrollment agreements, payment terms, media releases, mentor contractor agreements, privacy notices, background-check notices, and any jurisdiction-specific disclosures should incorporate or cross-reference this manual as needed.
- Nothing in this manual creates an employment relationship, fiduciary duty, publication guarantee, admission guarantee, recommendation guarantee, authorship guarantee, or any entitlement to remain in a program after VRI determines that removal, restriction, reassignment, or non-renewal is appropriate.

2. Definitions

Defined term	Meaning in this manual
Approved channel	A VRI-designated communication method, platform, or system authorized for mentor-student-family-staff interaction, including approved email, videoconferencing, chat, file-sharing, or LMS tools.
Archive materials	Recordings, screenshots, photographs, reports, posters, slides, writing samples, meeting summaries, and similar materials generated by, submitted to, or maintained by VRI.
Assigned mentor	The mentor or mentoring team designated by VRI for a student, group, lab, circle, cohort, or project.
Company materials	VRI-owned or VRI-controlled training documents, templates, curricula, workflows, forms, graphics, rubrics, handbooks, procedures, logos, names, and branded content.
Deposit	A non-refundable reservation payment collected to hold a seat,

	support matching and planning, and offset administrative work, unless VRI expressly states otherwise in writing.
Family	The parent(s), guardian(s), or other adult(s) responsible for a minor participant and any person acting on their behalf.
Mentor	An individual approved by VRI to guide or supervise research work, workshops, discussions, technical skill development, or scholarly deliverables.
Participant	Any student, mentor, parent, guardian, guest, contractor, or other person engaging with a VRI activity, platform, or program space.
Program	Any VRI offering, whether one-on-one, small-group, cohort-based, workshop-based, extension-based, or special-project-based.
Session	A scheduled live or asynchronous instructional, mentoring, advising, or review interaction conducted under VRI authority.
User content	Any content provided by a participant, including writing, slides, code, chat messages, forms, profile details, or recordings submitted into VRI systems.
Violation	Any conduct, omission, misrepresentation, or non-compliance that conflicts with this manual, a signed agreement, a stated requirement, or a lawful instruction from VRI.

3. Governance, authority, and companion documents

VRI reserves broad authority to adopt, interpret, amend, waive, supplement, or enforce this manual in whatever manner it deems reasonably necessary to protect safety, educational integrity, operational continuity, legal position, intellectual property, or business interests. The absence of a specifically listed rule does not prevent VRI from addressing conduct that undermines the program or the company.

- If there is a conflict between this manual and a signed VRI-specific agreement, the signed agreement governs to the extent of the conflict, unless applicable law requires otherwise.
- If there is a conflict between this manual and a program-specific posting, session notice, mentor brief, or tuition page, VRI may determine which instruction governs based on the context, date, and level of specificity.
- VRI may delegate review, investigation, documentation, or decision-making functions to directors, program managers, administrators, safeguarding leads, or outside professionals.
- VRI may adopt supplemental rules for particular offerings, age groups, software tools, countries, or research areas without rewriting the full manual.

3.1 Companion documents that should exist alongside this manual

- Student / Parent Enrollment Agreement and acknowledgments
- Deposit, Withdrawal, Refund, and Chargeback Policy

- Media, Recording, and Publicity Release
- Mentor Independent Contractor Agreement
- Background-check disclosure and authorization documents where required
- Privacy notice and data-use disclosure
- Internal incident response, documentation, and retention SOP

4. Program model, limitations, and no-guarantee disclosures

VRI operates as a mentored research and advanced scholarly-development organization. Its purpose is to provide structured opportunities for learning, inquiry, research communication, and project development. VRI does not promise any specific academic, publication, admissions, employment, scholarship, or reputational result.

- Participation is a privilege, not a right, and may be suspended, restricted, or terminated when VRI determines that doing so is appropriate.
- Publication, conference acceptance, symposium selection, recommendation letters, authorship, project continuation, awards, internships, future placement, academic credit, or external recognition are not guaranteed.
- VRI does not guarantee that a student will be matched with a particular mentor, remain with a specific mentor, remain in a specific group, or receive a schedule aligned with every personal preference.
- Programs may be changed, merged, postponed, reformatted, or cancelled based on enrollment, mentor availability, quality-control concerns, safety concerns, legal constraints, or business considerations.
- VRI does not provide medical care, psychotherapy, crisis counseling, legal advice, immigration advice, guaranteed college-admissions counseling, or employment placement services unless expressly stated in writing as part of a separate service.

Risk-management note. Clear no-guarantee language should appear not only in this manual but also in program pages, FAQs, offer letters, checkout pages, mentor onboarding packets, and signed student/family agreements.

5. Eligibility, enrollment, and account accuracy

Enrollment decisions remain within VRI's discretion. VRI may accept, waitlist, conditionally accept, decline, or remove an applicant or participant for academic, behavioral, logistical, legal, safeguarding, operational, or reputational reasons. Acceptance into one VRI offering does not create any entitlement to future acceptance.

- Students and families must provide complete, accurate, and current information, including identity, age, school status, location, emergency contacts, schedule constraints, accessibility needs, and any other information reasonably requested by VRI.
- Mentors must provide complete, accurate, and current information regarding name, legal identity, background, qualifications, affiliations, work authorization where relevant, location, time zone, tax status, and banking details needed for approved payment processing.
- Any material misrepresentation, omission, forgery, false publication claim, false resume or CV entry, false identity claim, false work-authorization claim, or concealed conflict may lead to rejection,

immediate removal, withheld deliverables, nonpayment where contractually allowed, or future ineligibility.

- VRI may request supporting documentation to verify identity, age, education, affiliation, publications, references, guardian authority, banking details, work authorization, or other information relevant to risk management or fraud prevention.

6. Student and parent / guardian roles and responsibilities

6.1 Student baseline commitments

- Engage seriously in the assigned project or program by preparing for meetings, completing readings and tasks, contributing to discussions, and following through on deliverables.
- Attend scheduled sessions on time, remain for the full scheduled period unless excused, and notify the mentor or VRI staff as early as reasonably possible if attendance is not possible.
- Communicate professionally and respectfully with mentors, teammates, staff, and guests using approved channels only.
- Support teammates, share responsibilities fairly, and seek mentor intervention early when team dynamics become strained.
- Comply with academic-integrity, digital-safety, confidentiality, and conduct requirements at all times.

6.2 Parent / guardian obligations

- Parents or guardians of minor participants remain responsible for the acts and omissions of the minor in connection with VRI programs to the extent permitted by law and must supervise the minor's compliance with enrollment, technology, scheduling, and conduct expectations.
- Families are responsible for reviewing session timing, time zones, hardware requirements, internet requirements, and program expectations before enrolling and before demanding changes that may disrupt a group.
- Families must maintain professional and respectful communications with mentors, administrators, and staff. Abusive, harassing, threatening, defamatory, or manipulative conduct toward VRI personnel or other families may result in communication restrictions, dismissal, or refusal of future service.
- Families may not coach, prompt, or materially interfere with live student sessions unless the program expressly allows a support role.
- Families may not record VRI sessions, share links, repost participant information, or contact mentors through personal channels unless VRI expressly authorizes it in writing.

6.3 Parent / guardian acknowledgments VRI should collect

- Consent to participation under published program standards
- Agreement to the deposit, payment, withdrawal, and refund policy
- Acknowledgment of no guaranteed outcomes
- Media / recording / archive release or a clearly defined opt-in / opt-out mechanism as approved by counsel
- Emergency contact and safety reporting acknowledgment

7. Mentor eligibility, vetting, and independent-contractor standards

Mentors are central to VRI's credibility and risk profile. Accordingly, VRI may establish rigorous eligibility, screening, and documentation requirements. Approval of a mentor is discretionary and may be revoked at any time if VRI concludes that continued engagement presents quality, safety, legal, or reputational concerns.

Mentor topic	VRI policy position
Eligibility	Mentors should possess relevant subject-matter expertise, academic or professional experience, communication skill, and the maturity required to work within a supervised youth-facing or emerging-scholar environment.
Truthfulness	Mentors must certify that all representations on their applications, resumes, CVs, publication lists, bios, websites, and interviews are complete and accurate.
Screening	VRI may require identity verification, reference checks, publication verification, sanctions screening, and background checks where legally permissible and operationally appropriate.
Contractor status	Unless a separate written agreement expressly states otherwise, mentors serve as independent contractors and not as employees, partners, agents, or fiduciaries of VRI.
Authority	Mentors may not bind VRI, modify company policy, promise refunds, grant admissions, use unapproved contracts, or make public statements on behalf of VRI without written authorization.
Benefits	Mentors are not entitled to employee benefits, health insurance, retirement plans, paid leave, unemployment benefits, or similar benefits solely by virtue of participation in VRI programs.

7.1 Mentor proposal, preparation, and continuity obligations

- Mentors must prepare a project scope, session plan, prerequisites, expected outputs, and realistic learning goals suitable for the age and preparation level of the assigned students.
- Once a mentor commits to an active program, the mentor must continue in good faith through the completion of the engagement unless VRI authorizes a transition, replacement, or early exit.
- A mentor may not abandon a live cohort or project, privately move VRI participants into outside services, or redirect a VRI project into a private commercial arrangement without prior written authorization from VRI.

8. Communications, platforms, recordings, and online-supervision controls

VRI is an online-first organization. Platform controls, communication pathways, recording standards, and data-location practices are therefore core safety and risk-management issues, not minor technical preferences.

- All routine mentor-student-family-staff communications must occur through approved channels unless VRI provides written permission for a different arrangement.
- Direct contact through personal social-media accounts, personal texting, personal phone numbers, consumer chat apps, or other unapproved channels is prohibited unless VRI expressly authorizes a defined exception.
- Mentors must conduct sessions from a professional, private, quiet, and appropriate workspace. Sessions from vehicles, beds, bathrooms, highly public spaces, or environments likely to compromise privacy or professionalism are prohibited.
- Any breakout rooms, subgroup sessions, or assistant-supported sessions must be actively monitored under a structure approved by VRI. Unapproved guests, family members, or unvetted assistants may not be left alone with students.
- Mentors should verify attendance and participant identity at the start of live sessions when feasible, particularly in youth-facing programs or programs using small-group formats.
- VRI may record sessions, presentations, and review meetings for quality control, safeguarding, training, documentation, dispute review, and archival purposes, subject to signed releases and applicable law.
- Participants may not make their own recordings, screenshots, or redistributions without explicit prior authorization from VRI and any other required participant consent.
- Recordings, attendance logs, session summaries, student submissions, and participant data must be stored only in VRI-approved systems and may not be maintained in ad hoc personal repositories unless VRI expressly approves a documented exception.

Operational best practice. If VRI intends to record meetings involving participants across multiple states or countries, counsel should review the consent language and workflow to ensure that recording notices and disclosures are adequate for the applicable jurisdictions.

9. Scheduling, time zones, attendance, and participation

VRI programs involve multiple time zones, shared cohorts, mentor availability constraints, and program-wide logistical dependencies. Families and mentors must therefore treat scheduling as a collective operational constraint rather than an individually customizable entitlement.

- Students and families are responsible for reviewing mentor time zones, published schedules, and program timing expectations before enrollment.
- VRI may schedule sessions based on mentor availability, cohort feasibility, and business logistics. The fact that a particular family prefers a different schedule does not obligate VRI to reconfigure a group.
- Repeated unexcused absences, chronic lateness, persistent disengagement, or failure to respond to scheduling communications may result in warnings, removal from a research team, reduced access to recommendations or certificates, or dismissal from the program.
- Mentors are expected to start and end sessions as scheduled, respond to reasonable messages within a reasonable time, and notify VRI promptly when attendance or continuity problems arise.
- Student technology failures, local connectivity problems, travel conflicts, school conflicts, extracurricular conflicts, time-zone misunderstandings, and undeclared schedule constraints generally do not create refund rights unless a published VRI policy or signed agreement expressly provides otherwise.

10. Academic integrity, research ethics, authorship, and deliverables

VRI is a research-focused environment. Honest work, proper attribution, intellectually serious conduct, and transparent authorship practices are central to program credibility.

- Students must do their own work except where collaboration is expressly permitted or expected and must acknowledge collaborators, mentors, sources, software, datasets, articles, books, websites, and AI tools where relevant.
- Students and mentors may not present AI-generated, copied, fabricated, ghostwritten, or improperly borrowed material as original work.
- Mentors must explain, model, and reinforce appropriate citation, attribution, data handling, and scholarly conduct.
- Authorship, acknowledgments, and credit should be discussed openly early in a project and revisited when the scope of contributions changes.
- VRI may remove or revise authorship, certificates, public summaries, or archival descriptions if it concludes that academic misconduct, material nonparticipation, or misrepresentation has occurred.
- Drafts, presentations, and poster sessions must be professionally prepared and submitted by any stated deadlines. VRI may require revision or withhold publication/posting until quality and compliance requirements are met.

10.1 No publication or authorship guarantee

No participant is guaranteed publication, formal authorship, public posting, recommendation letters, or external dissemination merely by enrolling, attending sessions, or paying fees. VRI may determine, in its discretion and in consultation with mentors where relevant, whether a project is ready for internal showcase, external submission, archive publication, or no publication at all.

11. Professional conduct, prohibited behavior, and youth safety

VRI requires a safe, respectful, and professional environment. The prohibited conduct categories below are intentionally broad. VRI may treat any substantially similar conduct as a violation even if not listed verbatim.

Violation category	Examples and policy stance
Harassment and bullying	Any repeated, severe, pervasive, threatening, humiliating, discriminatory, or retaliatory conduct directed at another person or group, including cyberbullying and rumor-spreading.
Sexual misconduct and sexualized conduct	Any sexual activity, sexually explicit communication, grooming behavior, suggestive communication, sexual jokes directed at participants, requests for sexual images, romantic pursuit of students, or any similar conduct. This is strictly prohibited.
Discrimination	Adverse or hostile conduct based on race, ethnicity, national origin, color, religion, sex, gender identity, sexual orientation, disability, age, or any other protected or comparable status.
Retaliation	Adverse action taken because a person raised a concern, participated in a review, refused inappropriate conduct, or requested help.

Boundary violations	Unapproved private meetings, off-platform communications, coercive dependency, requests for secrecy, or any relationship dynamics that undermine safe supervision or professional boundaries.
Threats and endangerment	Physical threats, self-harm threats directed to manipulate others, reckless conduct, doxxing, stalking, intimidation, or other conduct creating safety concerns.
Substances and weapons	Use, possession, distribution, or display of illegal drugs, misuse of prescription drugs, tobacco or vaping products where prohibited, alcohol misuse in program contexts, or weapons or weapon-like items in connection with VRI activities.
Privacy violations	Unauthorized recording, screenshotting, photographing, sharing personal data, sharing meeting credentials, or posting participant information without permission.
False information / impersonation	Falsifying attendance, forging approvals, posing as another participant, or submitting misleading information to VRI.

11.1 Youth safety and mentor boundaries

- Mentors and staff shall not engage in sexual or romantic conduct of any kind with students or minor participants, nor in conduct that could reasonably be interpreted as grooming or preparing the ground for such conduct.
- Mentors must not request secrecy from students regarding communications, gifts, off-platform contact, or problems with the program.
- Mentors must not ask students to connect through private or disappearing-message channels unless VRI has documented and approved the tool and its supervision protocol.
- Any suspicion of abuse, exploitation, grooming, credible self-harm risk, or serious endangerment must be escalated immediately under VRI's incident-reporting procedures.

12. Privacy, data handling, media releases, and archives

VRI collects and processes participant information to administer programs, communicate with families and mentors, operate sessions, maintain archives, document incidents, and protect the company's legitimate business interests. VRI should disclose its data-use practices clearly in a separate privacy notice and in program registration materials.

- Participants must provide only information reasonably requested for program administration, safety, payment, quality control, and compliance.
- Participant data may be shared internally on a need-to-know basis and externally with payment processors, background-check vendors, storage providers, communication vendors, or legal/compliance advisors as reasonably necessary and as permitted by applicable law.
- VRI may maintain recordings, chat logs, project drafts, attendance logs, reports, and archive materials for program administration, quality review, dispute review, training, historical record, or lawful business purposes.

- Parents or guardians should sign a separate media and recording release if VRI intends to use a participant’s name, likeness, voice, image, project excerpts, or testimonials in marketing, publicity, fundraising, or public archiving.
- Even when VRI uses commercially reasonable safeguards, no internet-based or cloud-based system can be guaranteed to be perfectly secure. VRI should avoid overpromising absolute security in public-facing language.

12.1 Archive and publicity expectations

VRI may maintain a permanent or long-term archive of approved program materials, such as session recordings, symposium recordings, posters, project summaries, and approved images. Archive use and publicity use should be governed by a separate release and by any opt-in / opt-out choices that VRI elects to provide as a business policy.

13. Payments, deposits, withdrawals, refunds, and chargebacks

VRI’s payment and refund rules should be strict, prominent, and repeated consistently across the website, checkout pages, invoices, registration forms, and enrollment agreements. Disputes often arise when families claim they did not understand timing, scope, or refund limitations; accordingly, the language should be plain, repeated, and documented.

13.1 Baseline policy positions

- A non-refundable deposit is required to reserve a seat unless VRI expressly states otherwise in writing.
- The deposit is refunded only if VRI cancels the relevant offering, cannot place the student after accepting the student, or otherwise elects in writing to issue the refund.
- Remaining tuition balances are due by published deadlines. Nonpayment, late payment, reversed payment, or failed payment may lead to loss of seat, withholding of materials, suspension of access, or dismissal.
- All refund requests must be submitted in writing by the person legally responsible for payment. Refunds or credits are never automatic unless VRI expressly promises an automatic refund for a specific situation.

Timing of written withdrawal request	Default VRI refund position
> 21 calendar days before the first scheduled live session	Refund of tuition paid, less the non-refundable deposit and any nonrecoverable third-party or administrative fees.
20 to 8 calendar days before the first scheduled live session	Up to 50% of tuition paid may be refunded, less the non-refundable deposit and nonrecoverable fees.
7 calendar days or fewer before the first scheduled live session	No refund absent written determination by VRI of extraordinary documented circumstances.
On or after the first scheduled live session, or after mentor matching / onboarding work has materially begun, whichever occurs first	No refund. VRI may, in its sole discretion, offer a limited credit rather than a refund in rare cases.
Dismissal for misconduct, voluntary withdrawal after notice of possible misconduct, chronic nonattendance, or	No refund.

schedule/time-zone incompatibility disclosed late	
--	--

13.2 Additional no-refund positions VRI may assert

- No refund is owed merely because a family becomes dissatisfied late in the program after substantial services have already been delivered.
- No refund is owed because a student failed to attend, failed to prepare, disliked the workload, disliked peers, or preferred a different mentor or schedule after assignment.
- No refund is owed because of student travel, school scheduling conflicts, extracurricular conflicts, local internet failures, device problems, or other circumstances outside VRI's control.
- Chargebacks or payment reversals for services already delivered may be contested by VRI using signed acknowledgments, attendance logs, invoices, communications, recordings where permitted, and mentor documentation.

14. Mentor compensation, invoices, taxes, benefits, and records

VRI's compensation practices should be written conservatively to protect against paying for incomplete, undocumented, or noncompliant work. Compensation terms should appear in the signed contractor agreement and may vary by program type, cohort size, extension work, or deliverable complexity.

Compensation topic	Recommended policy language
No prepayment	VRI will not prepay mentors before work begins unless a written exception is approved by authorized company leadership.
Installment timing	Unless a signed contractor agreement provides otherwise, VRI may pay compensation in staged installments, with no installment becoming due until the applicable work, logs, and documentation are completed and administratively approved.
Final payment	Final payment may be made only after final session completion, invoice submission, session summaries, attendance logs, incident reports if any, and required final materials are received and approved.
Required records	Session summary after each session; attendance and duration; notable student participation; assignments given; follow-up items; missed-session notes; incident notes when applicable.
Taxes and benefits	Mentors are responsible for their own taxes and are not entitled to employee benefits unless a written employment agreement expressly states otherwise.
Withholding / offset rights	To the extent allowed by contract and law, VRI may withhold or offset payments for materially incomplete work, falsified records, breach of policy, misuse of VRI property, unreturned materials, or other documented noncompliance.

15. Incident reporting, interim measures, review procedures, and appeals

VRI should respond to serious concerns in a structured, documented, and timely way. The goal is not to mimic a court proceeding but to create a fair, practical, and defensible internal process that protects safety and preserves evidence.

15.1 Reporting expectations

- Participants should report concerns as soon as possible. Mentors and staff should report serious concerns immediately and, where feasible, no later than 24 hours after learning of the issue.
- Reports should be documented in writing and should identify the date, time, participants, location or platform, conduct at issue, supporting screenshots or files if available, and any immediate safety concerns.
- Concerns involving possible abuse, exploitation, grooming, sexual misconduct, credible threats, or severe harassment should be escalated immediately to designated safeguarding leadership and, where required, to outside authorities.

15.2 Interim measures

- VRI may separate participants, change mentors, restrict platform access, pause communications, increase supervision, cancel a session, or temporarily suspend access while reviewing a matter.
- Interim measures are precautionary and do not by themselves establish that a violation occurred.

15.3 Review framework

- A designated reviewer or conduct committee may evaluate whether it is more likely than not that a violation occurred, based on documents, statements, communications, logs, and any other relevant information.
- VRI may resolve minor matters through coaching or warning, and more serious or repeated matters through written findings, restrictions, suspension, dismissal, refund denial, future ineligibility, or referral to law enforcement or counsel as appropriate.
- VRI may proceed without a participant's cooperation if that participant declines to respond or fails to attend a scheduled review meeting.
- VRI is not required to permit cross-examination or courtroom-style procedures; however, it should document its steps, evidence considered, and the outcome reached.

15.4 Outcomes and appeals

- Possible outcomes include coaching, written warning, restricted privileges, mentor reassignment, student reassignment, no-contact directives, suspension, dismissal, removal from public materials, withholding of certificates, withholding or reduction of payment where contractually allowed, and future ineligibility.
- Dismissed participants may be removed immediately from active sessions or platforms when safety, privacy, or program integrity requires it.
- Appeals should be narrow. A recommended model is a short written appeal window, such as 48 hours for urgent program decisions or up to 5 business days for non-urgent decisions, limited to procedural error, new information not previously available, or clearly disproportionate outcome.
- The final appeal decision should rest with a designated executive or owner-level decision-maker and should be final within VRI's internal process.

16. Intellectual property, branding, confidentiality, and anti-circumvention

VRI's name, model, structures, templates, logos, workflows, internal documentation, and branding are valuable business assets. Participants should not treat access to VRI materials as permission to copy, republish, appropriate, commercialize, or compete from those materials.

- The names Virtual Research Institute, VRI, and any associated logos, marks, visual identifiers, slogans, graphics, or branded program names are proprietary to VRI except to the extent any separate written license states otherwise.
- No participant may use VRI's logos, brand assets, screenshots, promotional language, proposal templates, handbooks, or confidential workflows for commercial purposes or to imply affiliation, sponsorship, or endorsement without prior written permission.
- Mentors, families, and participants may not reproduce or commercialize VRI's program structure, mentor workflows, training materials, internal rubrics, or proprietary templates in a manner designed to create a competing or confusingly similar offering using VRI know-how or materials.
- Mentors must treat nonpublic VRI documents, pricing structures, lead information, internal procedures, student lists, and operating playbooks as confidential.
- VRI may prohibit direct solicitation or circumvention. Families and mentors may not use VRI to identify one another and then bypass the company for substantially similar services during an active engagement and for any post-program restricted period defined in the signed agreement.
- Participants remain responsible for their own user content, but by participating they may grant VRI limited or broader rights, as defined in separate releases or agreements, to host, archive, display, adapt, or publicize approved materials.

17. Document control, amendment, severability, and review flags

This manual should be treated as a living master document. VRI may revise it from time to time as the company's offerings, staffing model, age ranges, technological systems, geographic reach, and legal environment evolve.

- VRI should maintain version numbers, effective dates, approval notes, and a change log for major revisions.
- If one provision of the manual is later found to be invalid, unenforceable, or unwise for a particular use case, the remainder should continue to operate to the fullest extent possible.
- Where a term in this manual is broader than applicable law permits, VRI should interpret and enforce it to the fullest lawful extent rather than abandoning the broader protective objective entirely.

Priority legal-review flags. Before public launch, qualified counsel should review at minimum: governing law and venue, arbitration or dispute-resolution clauses, parent responsibility language, youth-safety reporting obligations, recording consent processes, background-check notices, independent-contractor classification, tax and payment flow, trademark usage controls, confidentiality and non-circumvention clauses, and any cross-border participant issues.

Appendix A. Companion acknowledgments and operational checklists

A.1 Student / parent acknowledgments VRI should require

- I have reviewed the student responsibilities and understand that participation is contingent on compliance with VRI rules and mentor expectations.
- I understand that VRI programs are for young scholars and that publication, authorship, recommendation letters, and other outcomes are not guaranteed.
- I understand the deposit, payment, withdrawal, refund, and no-chargeback-support provisions and agree to them as a condition of enrollment.
- I understand that time-zone compatibility and attendance feasibility are my family's responsibility and that VRI is not required to redesign a group around my preferences.
- I consent to the approved communication, safety, recording, and reporting rules as described in the applicable policies and releases.

A.2 Mentor onboarding checklist

- Signed contractor agreement and confidentiality / brand-use restrictions
- Identity verification and any required background-check clearance
- Tax form and approved payment setup
- Reviewed safeguarding and communication rules
- Submitted project proposal, timeline, prerequisites, and expected outputs
- Confirmed understanding of documentation obligations, session-summary requirements, and no private side-deals policy

Appendix B. Implementation roadmap

Phase	Recommended next step
Phase 1	Finalize this manual internally; identify business decisions still requiring owner approval (refund windows, appeal timing, post-program non-circumvention period, publicity opt-in structure, storage stack, and complaint-routing chain).
Phase 2	Send the master manual plus companion agreements to Georgia counsel and employment / tax advisors for targeted review.
Phase 3	Publish a cleaned public PDF and a web page summary; update registration forms, mentor onboarding, offer letters, invoices, checkout pages, and privacy notices so that the language is consistent everywhere.
Phase 4	Train mentors and staff on documentation, safeguarding, incident reporting, recording practices, and approved channels. Audit compliance each term.