A Connected Platform

Innovation & Technology Hub™ User Guide

A practical guide for partners and the Administrator. From first inquiry to funding research, proposal development, budgets, professional agreements, project delivery, and documented results.

Bridging Vision With Opportunity

The Hub connects project inquiries, private workspaces, feedback, decisions, files, support, and outcomes. Each partner sees projects assigned to their verified email or their own free workspace. Choose Explore Free to register with email verification.

For A New Partner

Choose **Start A Project** to introduce your organization and its needs. No account is required to inquire. Confirm your email to submit the form and receive a reference number.

For A Free Or Invited Partner

Choose **Partner Sign In** and use your verified workspace email or the address invited to the project. Once signed in, open your project to see its brief, milestones, and next steps.

For The Administrator

For independent funding work, open **Funding Studio** and create your research workspace. Use **Start Here** to save your organization profile. Review the inquiry desk, accept suitable projects, assign the right people, and maintain a clear record of scope, decisions, and measured progress.

> **Explore Safely.** The sample workspace contains fictional records. Changes made there do not affect real projects and reset when you leave.

Prepared September 28, 2026. Contact the Administrator through the Help page for questions or assistance.

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01 | Begin A Partnership

From Inquiry To A Clear Next Step

1. Introduce Your Organization

Enter your name, email, organization, role, and mission. Use the email address where you want to receive the follow-up.

2. Describe One Important Challenge

Choose the type of help you need. Explain what takes too much time or falls through the cracks, who would use the tool, and how the work happens today.

3. Define Your Priorities

Describe a successful result, your preferred timing, and the budget or sponsorship category that best fits. Indicate the type of information the future app would handle. A budget category is not a price quote.

4. Confirm Your Email

Acknowledge the Privacy Policy and choose **Confirm My Email**. Enter the eight-digit code in the same browser within 10 minutes, then choose **Submit My Inquiry**. Check spam if the email is missing.

What Happens Next

The confirmation page shows your reference number. An acknowledgment is queued to your email address, and the Administrator is notified. The studio reviews fit, capacity, scope, and the right next step.

> **Keep The Introduction Focused.** Describe the information your app would handle without including passwords, financial account details, health records, confidential personnel records, or another person's sensitive information.

An inquiry does not create an account, reserve development time, guarantee acceptance, or commit you to a paid project. The project agreement establishes fees, deliverables, ownership, maintenance, and responsibilities.

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02 | Your Account

Sign In And Get Started

Your First Account

Choose **Partner Sign In** and enter the email address you registered with or that was invited to the project. Enter the code sent to that address in the same browser. If you need a fresh code, choose **Start Sign-In Again**.

Before a new account is created, enter your name and acknowledge the Terms Of Use and Privacy Policy. This acknowledgment is recorded once. The Administrator reviews your request and emails you when access is approved.

Choose Your Sign-In Method

After approval, follow the private setup screen to add a passkey or connect an authenticator. Save your recovery codes before continuing. Manage your sign-in methods later in **Menu > Account Security**.

Find Your Workspace

Choose **My Projects** to open a project, or **Funding Studio** to begin funding research and writing. Your workspace shows the projects and tools available to your account.

Manage Your Devices

In **Account Security**, review the devices you use and sign out any you no longer need. When finished working, choose **Sign Out** from the menu. If the Hub asks you to sign in again, your saved work remains available.

If You Need Help

Use the exact email address associated with your workspace. Check your spam folder for missing messages. If you cannot use your usual sign-in method, follow the options on the sign-in screen or contact the Administrator.

A Comfortable Start. Begin with one project or funding task. The Help page explains the main tools, and the private setup screens guide you when a connection is needed.

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03 | Work Together

Your Project Workspace

Area	How To Use It
Project Brief	Review the focus, scope, success measure, target date, and recorded project investment.
Milestones	Follow the planned steps and their status. The Administrator records updates.
Feedback	Keep questions, ideas, and responses together in the project conversation.
Files	Upload approved PDF, PNG, or JPEG materials up to 10 MB each. Download materials when needed.
Decisions	Review the exact request. A designated decision maker can approve or request changes.
People	See the assigned team and who can make project decisions.
Impact & Stories	Review a proposed case study and grant or withdraw publication permission.
Support	Describe an issue or improvement request and follow the studio response.

Record A Decision Clearly

Read the full request and its supporting materials. Choose **Approve This Request** or **Request Changes**. Explain the changes you need. The exact request, responding account, and response time are preserved. A changed scope requires a new request.

These are collaboration records. A separate contract or signature process may still be needed for the engagement.

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04 | Administer The Studio

A Professional Intake And Delivery Process

Review Before Accepting

Open **Inquiries**. Read the organization's mission, challenge, audience, desired outcome, timeline, budget, and information sensitivity. Record private review notes and a fit score. Consider mission fit, decision-making authority, manageable data, delivery capacity, and ongoing ownership.

Prepare The Workspace

Choose **Accept & Create Project**. The contact becomes the project's designated decision maker. Review the prepared brief and milestones, then use **People** to send the invitation. Acceptance itself does not send an invitation.

Manage Delivery And Access

Edit the brief to record deliverables, responsibilities, acceptance criteria, fees, and maintenance arrangements. Add milestones and request decisions at the appropriate points. Review verified accounts in **Account Approvals**. Approve, decline, or suspend access there. Assign approved members to their intended projects.

Protect Capacity And Information

Use **Studio Settings** to set a planning limit for concurrent active projects. Internal notes and planned or recorded work hours are restricted to the Administrator. Project fee and payment summaries are manual records. Use Business & Growth for controlled invoices and, after provider activation, online payment.

Follow Notification Activity

Communications records acknowledgments, invitations, and project updates. **Sent** means accepted by the email provider, not confirmed inbox delivery. Retry a queued or failed message when appropriate. Sign-in codes are excluded from this log.

Keep A Handover Record

Export studio records from Settings. Download individual uploaded files from the project's Files tab. Record exports include file metadata, not the file bytes. Establish backup, retention, restoration, and support responsibilities in the project agreement.

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05 | Show The Difference

Measure Results. Share With Permission.

Choose A Meaningful Measure

Record a starting point, target, current result, and unit. Use a measure tied to the work: hours to prepare a report, days to onboard a volunteer, completed registrations, or timely follow-ups. Include the measurement period, source, and limitations in the notes.

Measurements are entered by the project team. The Hub organizes the record; it does not independently verify the evidence or establish that the app alone caused a result.

Prepare A Case Study

In **Impact & Stories**, the Administrator drafts the exact title, challenge, solution, result, testimonial, and attribution proposed for public use. Request partner permission when the draft is ready.

Grant Or Decline Permission

The designated decision maker reads the complete draft and decides whether to authorize publication. Participation in a project does not automatically grant publicity rights. If changes are needed, explain them in Feedback and ask for a new draft.

Publish And Withdraw

After explicit permission is recorded, the Administrator can publish the approved story to **Work & Impact**. The designated decision maker or Administrator can withdraw it from publication. Withdrawal removes it from the studio website; it cannot retract copies already made elsewhere.

> **When A Save Fails.** Keep the page open so your input remains available. Read the message and try again. A success message confirms the saved change. Use the project's Support tab if a problem continues.

For account corrections, access closure, privacy questions, or help outside a project, contact the Administrator using the Help page.

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06 | Find Credible Funding

Build A Focused Research Pipeline

Funding searches, source links, saved searches, and shortlists require an **active paid subscription**. Free accounts offer previews and professional-service options. Your account export retains saved research after paid access ends.

Search Across Connected Sources

In **Funding Finder**, search Grants.gov, California Grants Portal, and EU Funding & Tenders together. ProPublica is a separate search of organizational filings, not open grants. Paid research searches use no drafting credits. Only keywords go to external sources; omit confidential information.

Save Your Focus And Refine The Search

Create a **Funding Profile** with your service area, organization type, and default keywords. Apply it to a search. Refine award amount, currency, closing date, or matching funds. Keep leads with missing information visible or exclude them. Filters apply to each page. Review each lead’s reasons and eligibility gaps.

Build A Shortlist And Return To It

Choose **Save Lead** to retain a source snapshot in your project. Compare up to three leads side by side. Open the original notice to verify amendments, application instructions, and the exact deadline. Choose **Start Proposal** for a grant opportunity. Organization filings remain research leads.

Watch Searches And Understand Coverage

Save a search. Optional watches check up to three searches daily when you open the workspace. The first check sets a baseline; later checks identify new results and changed notice details on the retrieved page. Use **Check For Matches** for a manual refresh. Notices appear in the Hub, without email alerts.

Source Coverage labels live connections, external portals, and license-required databases. Find state, local, foundation, and international portals, plus agency directories for all 50 states, D.C., and five U.S. territories. Directory links are not grant feeds. Licensed databases are not connected.

Verify Before Applying. Confirm eligibility, service area, award size, match, registrations, deadlines, and current availability with the funder. Respect donor privacy and every source’s permitted uses.

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06B | Independent Funding Intelligence

Independent Funding Research

Begin With Your Organization

Open **Funding Studio**. If you do not have a workspace, choose **Create My Workspace** and name your organization. In **Start Here**, save your mission, service area, applicant type, and keywords. Only keywords go to external sources.

Explore IRS Giving History

Choose **Funder Research**. Search an organization name, EIN, or topic. Headquarters state and IRS classification narrow the catalog. The recipient field searches the processed payment subset. Profiles show payments, recipient locations, median payment, available periods, and original filings.

The initial catalog contains 151,902 organization records. Detailed history covers a selected 35 organizations, 41 filings, and 24,445 organization payments. IRS records describe past activity, not open applications. Check retrieval dates. Missing payments are not proof that no grant was made. Recipient addresses do not establish service areas.

Keep Research Connected To An Application

Choose **Save Funder** and record private relationship notes. **Start A Funder Prospect** opens a proposal record. Replace its historical research link with current application guidelines before applying. **Funding Finder** ranks retrieved notices using your profile and explains matching terms. Relevance does not predict an award.

Follow Responsibilities And Deadlines

Open **My Pipeline** to see applications by stage. Open a card to update it through the proposal editor. Add tasks, responsible teams, due dates, and status. Totals remain separated by currency. Submissions retain approval and evidence requirements.

Use Your Calendar

Choose **Calendar & Deadlines**, then **Export Calendar**. Import the downloaded ICS file into your calendar. Entries are all-day events; check exact closing times and time zones with the funder. Re-export after changes. This is not live synchronization or a background email-alert service.

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07 | Develop A Proposal

Write With Evidence And Clear Authority

Build The Narrative

Create a proposal or open a saved lead. Record the funder, official source, deadline with time zone, and responsible person. Use the Narrative tab for the executive summary, need, design, outcomes, capacity, sustainability, and budget narrative. Set section word limits from the actual instructions.

Maintain The Evidence Register

For each supporting fact, record the claim, title, source link, source date, and human verification. Review the original material before checking verification. Editing an evidence entry clears its verification. Approval requires at least one verified evidence entry, with every recorded entry verified.

Link An Approved Budget

Select a budget from the same project. Its currency and grant request must match the proposal. The budget must be approved before the proposal can be approved for submission. A later budget revision requires a new proposal approval.

Complete Readiness Review

Review eligibility, deadline, funder rules, authority, cost allowability, evidence, assisted-writing policies, registration, privacy, and required attachments. Record the findings and applicable jurisdictions. Checkboxes document review; they do not independently establish compliance.

Obtain Partner Approval

The designated partner decision maker must select **Approved For Submission** and save the record. Administrator access alone does not permit approval on the partner's behalf. The Hub binds approval to the approved budget revision.

Record The Actual Submission And Result

Submit through the funder's required process outside the Hub. Record the real confirmation before marking Submitted. An Awarded record requires the actual award amount and supporting notice. Record reporting obligations and the next reporting date. The Hub does not submit applications automatically.

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08 | Build A Defensible Budget

Make The Numbers Traceable

Start With A Planning Structure

Create a Program, Technology, or Research budget. Starting lines are a structure with zero amounts, not verified estimates. Choose currency and a duration of one to five years. Enter documented unit costs, quantities, periods, and justifications.

Separate The Funding Sources

Allocate each line to Grant Request, Committed Match, Anticipated Match, or In-Kind. Confirm whether the funder accepts the proposed cash or in-kind match and its valuation. Only committed cash and recorded in-kind amounts count toward the calculator's committed match. Anticipated match blocks budget approval.

Document Fringe And Indirect Costs

Fringe applies to personnel lines. Choose no indirect costs, selected direct costs, or federal modified total direct costs. Record the authority for the rate and the award rules. The federal de minimis choice is capped at 15% under current rules and 10% for earlier rules, subject to eligibility and the applicable award terms.

The MTDC calculation excludes equipment, capital expenditures, patient care, rent, tuition and scholarships, and participant support. Current rules cap included subawards at the first $50,000 each across the period; the earlier-rule setting uses $25,000. Use one consistent subaward identifier across years and record any base already used before this budget.

Compare Practical Scenarios

Mark only costs that should change as variable. Essential, Core, and Expanded scenarios apply 85%, 100%, or 120% to variable lines. Escalation applies by year. Review the annual table, request ceiling, match gap, and documented assumptions before approval. In-kind contributions and all direct categories still require funder-specific allowability review.

Export And Maintain The Record

Save to retain a revision. Export **Budget CSV** for a spreadsheet or **Word** for a narrative record. Exports contain calculated values, not live spreadsheet formulas. Word exports of unsaved edits are labeled as working drafts. Duplicate a record to explore an alternative without replacing its saved history.

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09 | Professional Services

Agree Fair Service Terms

Choose The Appropriate Agreement

The Administrator can generate an MSA, MCLOSA, Statement Of Work, Software License, Maintenance And Support Agreement, Pro Bono Services Agreement, or Data Protection Addendum. MCLOSA means Master Customer License And Online Services Agreement.

Define Scope And Compensation

Record the legal parties, governing law, term, deliverables, acceptance, responsibilities, payment timing, and support. All budgets are considered. Choose fixed, capped hourly, retainer, milestone, sliding-scale, sponsored, or pro bono services. Scope and capacity determine acceptance.

Grant and charitable fundraising compensation is based on services performed. Percentage-of-award, percentage-of-gifts, and award-contingent fees are excluded to align with AFP and Grant Professionals Association ethics. Whether a service cost can be charged to an award requires a separate funder and cost-allowability review.

Reserve The Right Intellectual Property

Identify client materials, studio methods and reusable components, third-party software, and any client-specific deliverables. Specify the ownership or permitted use of each. Maintenance fees and responsibilities belong in the signed arrangement, not an assumed perpetual service promise.

Limit Pro Bono Use Clearly

Pro bono sets service and maintenance fees to zero while retaining studio IP. Define limits for users, storage, support, and duration. Limited hosted access permits the agreed work, with no ownership, resale, sublicensing, or commercial licensing rights. Disclose approved third-party costs.

Review And Execute Deliberately

Negotiate general and security liability caps, incident notice, data handling, retention, exit assistance, and nonwaivable exceptions. Qualified counsel must review jurisdiction-specific enforceability and duties. Ready For Signature requires a recorded legal review. Executed requires a reference to an actual signed counterpart; selecting a status is not a signature. Executed content is fixed. Create a new amendment draft for changes.

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10 | AI Grant Writer

Write The Next Application

Start With An LOI Or Proposal

Open **Funding Studio > AI Grant Writer**. Choose Letter Of Inquiry (LOI), Full Proposal, Executive Summary, Statement Of Need, Outcomes And Evaluation, Budget Narrative, Logic Model, Funder Criteria Review, or Revised Draft. Select an existing proposal or choose **New Brief**. Record the organization, mission, program, funding request, and funder instructions, then save the brief.

Use Your Hub Workspace

The Administrator connects AI writing for the Hub. Members use it within their own workspace and plan allowance; a separate Claude account is not needed. If writing is not yet available, save your brief and work in the editor. The private Administrator screens guide connection setup.

Generate From Authorized Information

Set a tone and target of 75-2,500 words. Add specific writing instructions, then choose **Review & Generate**. Inspect the exact content and authorize its transfer to the listed provider. Choose **Generate My LOI** or **Generate My Draft**. Each completed subscriber task uses five Hub credits. Failed requests release the reservation. The sample workspace does not contact an AI provider.

Edit, Save And Export

Edit the returned text directly. **Shorten**, **Strengthen**, and **Simplify** prepare a revision request for your review. **Save Draft To Proposal** adds a new section and retains prior content and revisions. Open the proposal to edit evidence and link a budget. Choose **Prepare Word File**, then **Download Word File**. You can also download **Text** or copy the draft. Original generated drafts remain in the project writing history.

Keep Evidence And Judgment Central

The writer has no live web access and uses only the supplied brief, evidence, budget, and selected revision text. Missing facts should be flagged for confirmation. Uploaded files, donor lists, studio notes, and credentials are not attached automatically. Review every factual claim, amount, word limit, and funder rule. The Hub does not automatically submit applications or promise awards.

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11 | Reusable Organization Knowledge

Write From A Trusted Foundation

Build The Organization Profile

Open **Organization Library**, select the project, and create a profile. Record the organization name, mission, programs, service area, people served, and a next review date. Profiles stay within the selected project; a shared organization name does not grant access to another project.

Document Every Reusable Fact

For each fact or outcome, record the claim, source and verification notes, optional source address, verification date, and review-by date. Do not treat a link alone as evidence. Keep sensitive personal records out of the fact library.

Approve And Review

The Administrator or designated partner decision maker can approve a profile. Expired facts and future verification dates must be resolved first. Reopen an approved profile before editing it. Earlier revisions remain available in History.

Bring Knowledge Into A Proposal

In a proposal, choose **Use Organization Profile**. Select an approved, current profile from the same project. Current facts are added to the evidence register; expired facts are omitted. An empty Organizational Capacity narrative can be filled from the profile. Existing narrative is preserved.

Imported facts are marked for review in the specific application. Verify them, check their relevance and permissions, and save the proposal. An approved profile does not establish funder eligibility or replace a final accuracy review.

> **Reuse With Context.** Export Reuse Packet provides current approved knowledge for a permitted workflow. Review the packet before transferring it to any outside service.

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From Scope To Payment

Prepare A Service Engagement

Use **Service Playbook** as a private starting point. Its amounts are planning assumptions. Confirm the scope, fee, time allowance, deliverables, exclusions, payment schedule, and expiry. Link a service agreement before sharing.

Record The Partner Decision

Choose **Share Scope In Workspace**. The partner decision maker reviews the exact terms, enters their name, and approves or declines. The Administrator cannot approve for the partner. Accepted scope stays fixed; create a new scope for an amendment. Sharing changes workspace visibility and does not send a new email.

Complete Legal Execution Separately

Scope approval is a recorded business decision, not the execution of the legal agreement. Complete the signed counterpart through the agreed signing process, retain it privately, and record its reference in Funding Studio. Qualified legal review remains part of that agreement workflow.

Issue And Reconcile An Invoice

Create the deposit, milestone, assessment, or balance invoice against an accepted engagement. Enter the service amount, applicable tax, due date, and payment instructions. Issuing requires a linked executed agreement. Nonrecurring invoices cannot cumulatively exceed the accepted service fee. An issued record cannot be edited; void an incorrect unpaid invoice and prepare a corrected draft.

Online payment requires an activated provider connection. Verified provider events confirm collection. For manual payment records, enter only funds actually received and retain a reference. Recording a payment or refund does not move funds.

> **Protect Financial Records.** Engagements, invoices, and care plans are restricted to the Administrator and the project decision maker. Collaborators do not receive commercial access. Exports contain private information.

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13 | Care & Award Management

Support The Work After The First Milestone

Define A Sustainable Care Plan

Link an accepted monthly retainer engagement. Match its agreed monthly fee and document included hours, services, response targets, start date, renewal review, notice period, and overage terms. Activation requires an executed service agreement. Additional work requires a separate agreement on scope and fees.

Prepare One Monthly Invoice

For an active plan, select the service month and due date, then choose **Prepare Draft Invoice**. The same plan and month return the retained invoice rather than a duplicate. Review the service amount and applicable tax before issuing. No automatic charge or automatic renewal occurs. Pause or end the plan when appropriate; review the contract for notice obligations.

Record An Actual Award

Upload the award notice in the project Files tab. In **Award Management**, record the funder, reference, dates, restrictions, and approved amount. Allocate the full award to budget categories. This confirms a record entered by the team, not independent verification of the funder notice.

Track Spending And Reporting

Enter actual expenses with a budget category, date, description, and receipt or ledger reference. The award view compares approved amounts with recorded expenses and highlights negative category balances. A recorded expense is not an allowability determination or an accounting-system reconciliation.

Add each reporting or other obligation with a responsible person or team and due date. Submission and acceptance statuses require supporting evidence. The workspace shows open obligations and overdue dates; it does not automatically file reports or send scheduled deadline reminders.

Close Out Deliberately

Complete the reporting, resolve budget and restriction questions outside the calculator as required, and record acceptance evidence for every obligation. Then complete closeout. Closed records remain fixed. Record the next renewal review when applicable.

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14 | Financial And Operational Oversight

Understand The Return

Include The Full Delivery Cost

The Administrator opens **Profitability** to record founder time, staff time, contractors, software and data subscriptions, payment fees, and other delivery costs. Enter either time and rate or a fixed amount, with a supporting reference. Correct mistakes by voiding the entry and recording the replacement; history remains available.

Read The Measures Precisely

Net Collected excludes recorded tax and refunds. Partial refunds allocate service revenue proportionally. Cash Contribution subtracts recorded delivery costs; its margin divides by net collected service revenue. These are cash measures, not accounting profit or tax calculations.

Outstanding and overdue invoice amounts include tax. Contracted Monthly Fees summarize active care terms and are not collected or recognized revenue. The older project summary fee and payment fields are excluded to avoid double counting. The dashboard is only as complete as the records entered.

Check Readiness Honestly

Use the private **Studio Settings** screens to manage connections and service reviews. Follow each setup prompt and keep the studio’s operating information current.

Keep Recoverable, Verifiable Records

Export studio records and download uploaded files separately. Verify Retained History checks the signed revisions of new business and knowledge records. It cannot detect complete record deletion; keep separate exports. Restoration testing and independent review remain operational responsibilities.

Current Release Boundary. The company domain, live payments and AI, licensed data, external signing automation, reminders, SSO, malware scanning, and independent assurance still require their own setup or review.

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15 | Plans & Credits

Explore First. Upgrade Deliberately.

Open **Plans & Credits** and choose your organization workspace. A managed professional project follows its written service scope; a self-service workspace shows its plan, end date, remaining credits, and credit activity.

Explore: $0 Per Month

Ongoing free access includes 30 one-time starter credits, one user, six saved records, and 25 MB of files. No card is required and no paid conversion is automatic. Starter credits do not replenish. Existing legacy trials keep their original end date.

Paid Monthly Plans

Essentials: $39 | 75 credits | 1 user | 25 records | 250 MB.
Growth: $79 | 200 credits | 3 users | 100 records | 500 MB.
Impact: $99 | 350 credits | 5 users | 200 records | 1 GB.
Partner: $199 | 800 credits | 15 users | 200 records | 5 GB.
One organization workspace per plan. Taxes and human services are separate. Existing paid periods keep their original allowances.

Understand Credits And Previews

A completed assisted task costs five credits, shown before authorization. Failed requests release reserved credits. Manual editing, browsing, and exports are free of credit charges. Paid credits do not roll over. AI writing is available when the service is connected. Upgrade previews describe additional capacity; they do not unlock it.

Choose A Plan Deliberately

Review and acknowledge the final-sale policy, then request a plan. The studio confirms services, price, taxes, and payment instructions. Paid access requires verified payment or funded sponsorship. Renewal is manual; the Hub does not automatically charge a card. Choose **Do Not Renew** to record nonrenewal.

Final Sales

No discretionary refunds, prorated refunds, or credits apply to cancellation, non-use, unused credits, or a change of mind. Refunds, billing corrections, and other remedies required by law remain available. New terms apply to future purchases and renewals; they do not rewrite an existing agreement.

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16 | Fundraising, Marketing & Learning

Build Beyond One Funding Source

Create A Diversification Plan

Choose **Fundraising & Marketing**, select the workspace, and define the objective and planning period. Add suitable revenue channels: grants, individual donors, recurring giving, sponsorships, campaigns and events, or earned revenue.

Give Each Channel A Practical Next Step

For every activity, enter target revenue, direct costs, an audience group, the message, a responsible person or team, a due date, and a measure of progress. Keep private donor profiles out of this planner. Choose **Keep This Channel**, then **Save The Plan** to store your changes.

Read The Numbers Carefully

The summary shows target revenue, direct costs, their difference, and the largest channel’s share of the planned total. These are planning assumptions, not forecasts or secured funding. The difference does not include unspecified overhead. Use the concentration figure to discuss dependence on a source, not as a universal risk threshold.

Develop The Team

Open **Training** for the Funding Diversification Lab, Responsible AI & Grant Writing, Marketing & Storytelling Studio, and Team Enablement & Office Hours. Submit an inquiry with your goals, audience, accessibility needs, timing, and budget. Dates and fees are confirmed in a separate scope.

Make The Learning Useful

Choose a concrete practice exercise and an owner for the next step. Training can support a single workshop, a defined series, a sponsored cohort, or a train-the-trainer engagement. Formal certification or continuing education credit is not included unless separately specified.

> The planner does not send donor outreach, collect contributions, or submit applications. Confirm permissions and applicable solicitation, tax, privacy, and funder rules before acting.

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17 | Administration & Rights

A Sustainable, Accountable Practice

Record Paid Access

In **Plans & Credits**, use **Record A Verified Paid Period** only after verifying actual payment or funded sponsorship. Upload a redacted receipt to project Files, choose the plan and payment source, enter the reference and end date, and confirm your verification. Confirm the payer accepted the price, access dates, and final-sale policy before payment. A reference may fund only one period. Current paid periods cannot overlap. This records payment verification; it does not move money.

Keep A Related-Party Engagement Independent

If the principal serves on a prospective client's Board, disclose the relationship before contracting. Have the client's authorized, disinterested decision makers review comparable pricing and document approval. The interested person does not approve for the client. Follow the organization's conflict policy and applicable law; obtain legal advice for the actual arrangement.

Protect The Platform And Client Materials

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Use Licensed Creative Assets Carefully

Keep each asset's source, license, permitted use, and any required attribution. A Creative Cloud plan does not establish every Stock entitlement. Adobe Stock imagery cannot be used as a company logo. Verify the actual plan and each proposed use before adding or distributing licensed assets.

Understand Connected Services

The public Hub supports free enrollment with email verification. Private projects and paid funding research retain their access checks. Assisted drafting, automated recurring billing, licensed research feeds, and external signatures require separate setup. Paid access starts after verified payment or approved sponsorship; automatic card charges are not enabled.