Information for Interested Organizations

Stewardship. Transparency. Community.

> *Your processor handles the transaction. Inclusion Forward Initiative handles the trust that comes afterward.*

This is background for any organization deciding whether Inclusion Forward Initiative is worth a closer look, or worth sharing with someone else on your team. It answers the questions that usually come up before a formal application: what you'd actually commit to, what running it looks like day to day, what the platform can and can't do for your reporting, and who qualifies.

Start With One Initiative, Not Your Whole Portfolio

Adopting Inclusion Forward doesn't mean moving your organization's finances or your whole fundraising operation onto a new platform. Most organizations start with a single initiative or campaign, the one they most want to make visible to supporters, and scope the platform to just that.

Transparency stays scoped to whatever you choose. If you connect one initiative, only the contributions, allocations, and outcomes tied to that initiative are visible. The rest of your organization's finances stay exactly where they already are.

Many organizations also use donor voting to decide which initiative gets this treatment in the first place, inviting supporters into the choice rather than making it internally. This follows the same approach many community foundations and funders use to give donors real say in what gets funded next, not just a survey afterward.

How Documentation Actually Works

The goal is for this to add nothing to what your program staff already do, not create a second job on top of it.

Every contribution to a scoped initiative is tracked automatically. What your team adds is the next two steps: recording how pooled funds were allocated toward the initiative's goals, and

recording the outcome once it happens, units delivered, people served, a milestone reached. That's the update your Program Administrator would already be making internally. Logging it here means it's also the public record.

This mirrors what works at small nonprofits generally: a lightweight habit of capturing outcomes as they happen, in one place, beats a heavier framework nobody keeps up with. You are not asked to adopt a logic model, a theory of change, or a formal evaluation framework. You're asked to log three things as they occur: what came in, what it went toward, and what it produced.

What Reporting Gives You, and What It Doesn't Replace

Once contributions, allocations, and outcomes are logged, Inclusion Forward can generate a report at any time, for any audience: your board, a corporate donor, a journalist, the general public. That's a meaningful capability for a small organization that would otherwise have to reconstruct this story by hand once a year.

It is not a nonprofit ERP, and it is not a substitute for one. Here's the line, plainly:

Built in, and available today	Stays a separate obligation
An always-current record of contributions, allocations, and outcomes, available on demand	Form 990 filing and IRS reporting
Reports structured to align with how program and impact information is presented to funders, boards, and the public	GAAP fund accounting and audited financial statements
A donor-facing view and an internal view, built from the same underlying record	State charitable solicitation registration and filing
A practical on-ramp for organizations not yet ready to adopt a full fund accounting system	Payroll, general ledger, and day-to-day bookkeeping

If your organization doesn't yet use a full fund accounting system, Inclusion Forward can serve as a practical starting habit, the discipline of tracking money to outcome as you go, without asking you to adopt or pay for enterprise accounting software before you're ready. When you do grow into one, the habit transfers directly.

See It Before You Read More About It

View the live demo → inclusionforward.app/demo

A working example, seeded with sample data, showing exactly what a donor and what your own team would see. Five minutes here will tell you more than the rest of this document.

Who Controls the Money and Donor Identity

Your organization keeps its own payment processor, its own banking relationship, and stays merchant of record. Inclusion Forward never holds, moves, or has custody of donor funds. It receives transaction data through your processor's API to build the public record of what happened, nothing more.

Donors choose, at the time they give, whether to be publicly recognized or to give and vote under a private identity. Either way, identity is protected in layers: a public identifier is the only thing ever shown to anyone, a separate internal link connects it to an account, and a real name is stored encrypted and reachable only through a formal, permanently logged disclosure process. A compromised public profile does not, by itself, expose a real identity.

What It Costs

The platform itself is free for qualifying organizations. There's no tier where the core transparency and reporting tools are held back pending payment. Optional paid support is available for organizations that want hands-on help running it, and a separate sponsorship fund, funded by donors and corporate partners, helps cover that support cost for organizations that can't pay for it themselves. Neither is required.

Who Qualifies

Legal and Operational Standing

- Current IRS 501(c)(3) determination letter
- No active revocation of tax-exempt status
- Current on required federal filing for your organization's size
- Registered for charitable solicitation in any state where that's required for how you fundraise
- An identifiable governing board, not a single unincorporated individual
- Your own merchant-of-record payment processor relationship, already in place or actively being set up

Mission and Conduct

Inclusion Forward Initiative is built on principles of dignity, accessibility, and inclusion, and does not engage in partisan political activity or advocacy. Faith-based organizations are

welcome to apply on the same basis as any other nonprofit. To qualify, an applicant's mission, programs, and public communications must not target, promote hatred toward, or advocate discrimination against any person or group on the basis of disability, race, religion, sex, national origin, sexual orientation, gender identity, or age. Eligibility determinations are based on an organization's own public statements and program activity, made in good faith by Empowered Solutions, and an applicant may request reconsideration if declined.

Next Steps

If this fits what you're looking for, the next step is the application itself, where the full qualifying criteria and process are confirmed for your organization specifically. If you're still deciding, the demo above is the fastest way to see whether this is worth pursuing further.

Questions before then are welcome. Reach out directly and we'll walk through it with you.