IMPACT · TEMPLATE GUIDE

Classic 2.0 Template Guide

Updated with demo report screenshots

Front Cover

COPY

All headings are always all caps.

The report title should be 25–55 characters with spaces and fit on 1–3 lines.

IMAGERY

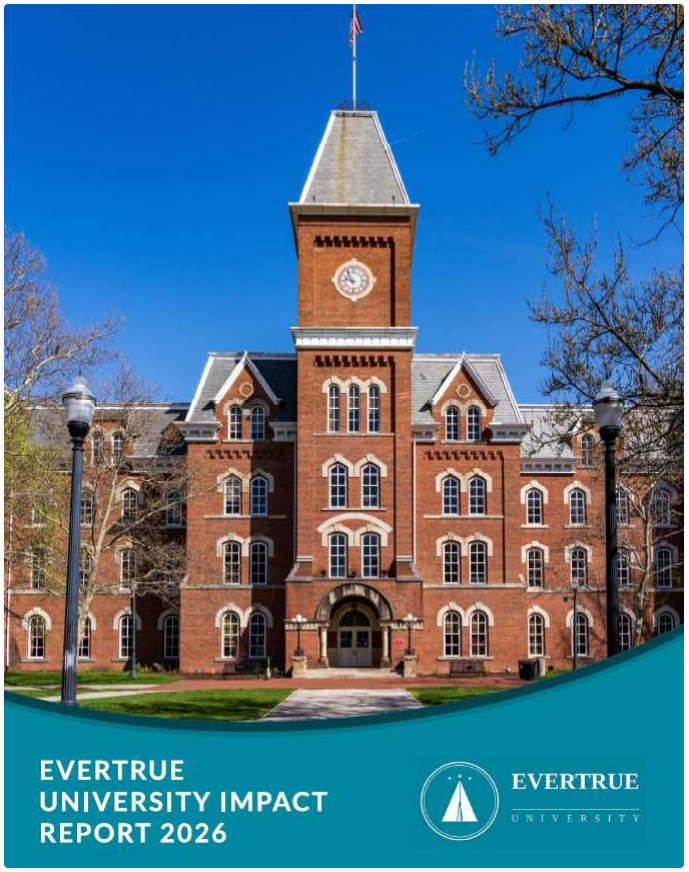
Full-bleed cover background must be sized to 2625 × 3375 pixels and be a JPG, JPEG, or PNG.

Institution logo should be a transparent PNG sized to fit 900 × 345 pixels. Since the logo sits on the organization's primary color, any primary color in the logo will fade into the background — we suggest an all-white or all-black version here instead.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — this is a static, template-level asset.

Images must be optimized to 300 DPI for best print quality.



Leadership Message

COPY

All headings are always all caps. Heading should be 25–55 characters with spaces (fits on 1 line).

Statement content (justified by default) from organization or foundation leadership, providing a narrative to the stewardee.

Statement body can run up to 1,800 characters with spaces across up to 5 paragraphs (not including author name/title).

Author name has no fixed character limit; author title should be 60 characters or fewer with spaces.

This page is static, so the content created in the template will apply to all reports using this template.

IMAGERY

Leadership headshot must be 750 × 750 pixels and either JPG, JPEG, or PNG format.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — static template content.

Images must be optimized to 300 DPI for best print quality.



MESSAGE FROM THE PRESIDENT

It is with deep gratitude that I share your 2026 endowment report from EverTrue University. Some people make choices that quietly change the course of another person's life. By investing in this endowment, you have made exactly that kind of choice — and this year, it reached further than ever. In fiscal year 2026, the endowment distributed $10.2 million to support scholarships, faculty, and the programs that define an EverTrue education, funding 170 scholarships for students who might not otherwise be here.

The cost of higher education keeps that opportunity out of reach for too many. Over the coming decade, millions of qualified students may never enroll simply because they cannot afford to. Your gift answers that with something durable: a permanent source of support that will nurture curious, determined young people long after this year's students have graduated and begun to change the world themselves. That is the quiet power of an endowment — a promise that renews itself, year after year.

Thank you again for your generosity, and for believing in what our students can become. I hope you take real pride in the difference your commitment makes.

JANE T. NEWTON, PHD
PRESIDENT

Overview

COPY

All headings are always all caps. Heading should be 25–55 characters with spaces (fits on 1 line).

An overview of the organization's endowment program, investment policies, and/or overall endowment performance for the year.

Statement body can run up to 2,000 characters with spaces across up to 5 paragraphs.

This page is static, so the content created in the template will apply to all reports using this template.

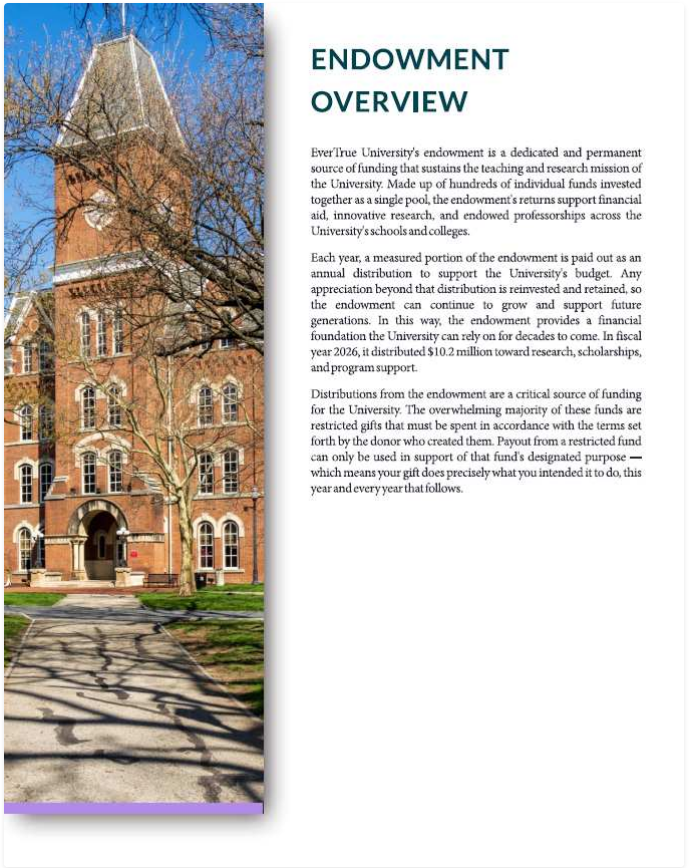
IMAGERY

Required portrait sidebar photo must be sized to 998 × 3095 pixels and be a JPG, JPEG, or PNG.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — static template content.

Images must be optimized to 300 DPI for best print quality.



Endowment Performance

COPY

All headings are always all caps. Heading should be 25–55 characters with spaces (fits on 1 line).

This static page uses up to 3 chart images or supporting imagery that complement the Overview page. For best quality, these images should ideally not contain embedded copy.

Statement body: up to 400 characters with spaces across 3 blocks (one block per chart/image).

This page is static, so the content created in the template will apply to all reports using this template.

IMAGERY

Each chart image must be sized to 1080 × 660 pixels and be a JPG, JPEG, or PNG.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — static template content.

Images must be optimized to 300 DPI for best print quality.



Flex Page

COPY

All headings are always all caps.

Intended for any additional content needed for reporting — for example, a message from a second leadership voice, as shown in the updated sample.

Statement body can run up to 1,800 characters with spaces across up to 5 paragraphs (not including the page heading).

This page is static, so the content created in the template will apply to all reports using this template.

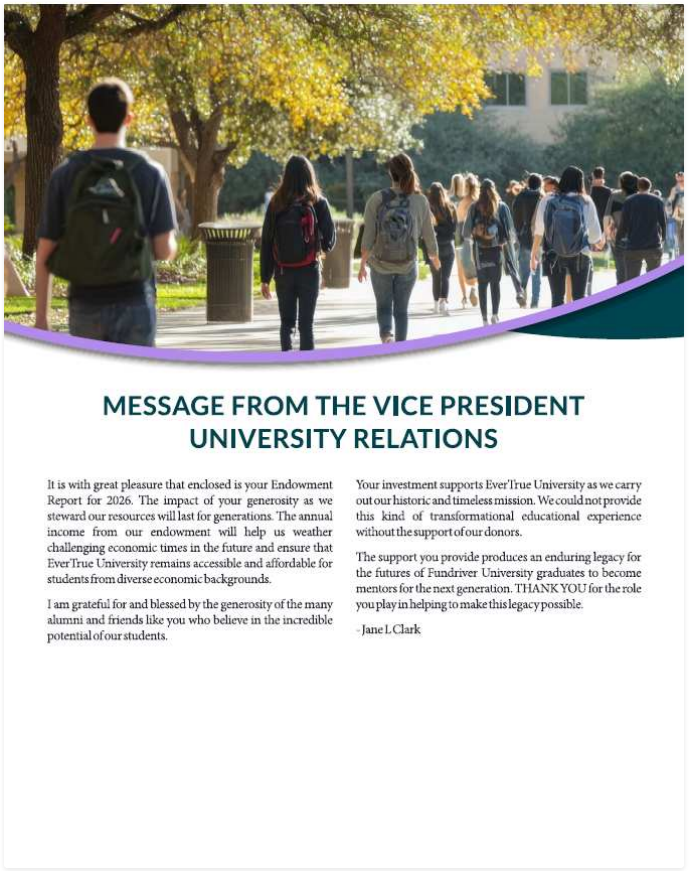
IMAGERY

Header photo (required default) should be 2625 × 1440 pixels and a PNG, JPG, or JPEG.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — static template content.

Images must be optimized to 300 DPI for best print quality.



MESSAGE FROM THE VICE PRESIDENT
UNIVERSITY RELATIONS

It is with great pleasure that enclosed is your Endowment Report for 2026. The impact of your generosity as we steward our resources will last for generations. The annual income from our endowment will help us weather challenging economic times in the future and ensure that EverTrue University remains accessible and affordable for students from diverse economic backgrounds.

I am grateful for and blessed by the generosity of the many alumni and friends like you who believe in the incredible potential of our students.

Your investment supports EverTrue University as we carry out our historic and timeless mission. We could not provide this kind of transformational educational experience without the support of our donors.

The support you provide produces an enduring legacy for the futures of Fundriver University graduates to become mentors for the next generation. THANK YOU for the role you play in helping to make this legacy possible.

- Jane L. Clark

Statistics Page

COPY

All headings are always all caps. Heading should be 25–55 characters with spaces (fits on 1 line).

A visual way to share important data with the stewardee. Up to 6 stats are available.

Each stat's data value should be 7 characters or fewer with spaces; each corresponding descriptive should be 30 characters or fewer with spaces.

This page is static, so the content created in the template will apply to all reports using this template.

IMAGERY

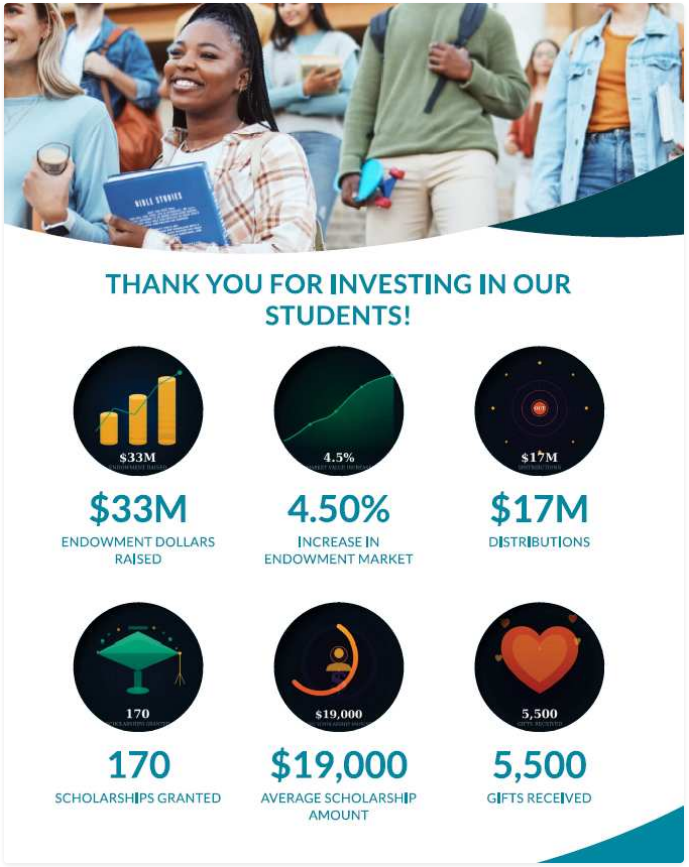
Required banner header photo must be sized to 2625 × 1050 pixels.

Each of the 6 circle photos must be sized to 450 × 450 pixels and be a JPG, JPEG, or PNG.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — static template content.

Images must be optimized to 300 DPI for best print quality.



Financial Pages

COPY

There are multiple versions of this page chosen during onboarding and setup.

Most content here is added dynamically to a report based on the funds being reported on. Fund info (fund header and narrative) correlates directly to fields in Balance. The fund header pulled in from Balance is always all caps.

Fund Header should be 40–50 characters with spaces; Fund Narrative should be 40–50 characters with spaces. Together, fund header + narrative can run up to 300 characters with spaces.

IMAGERY

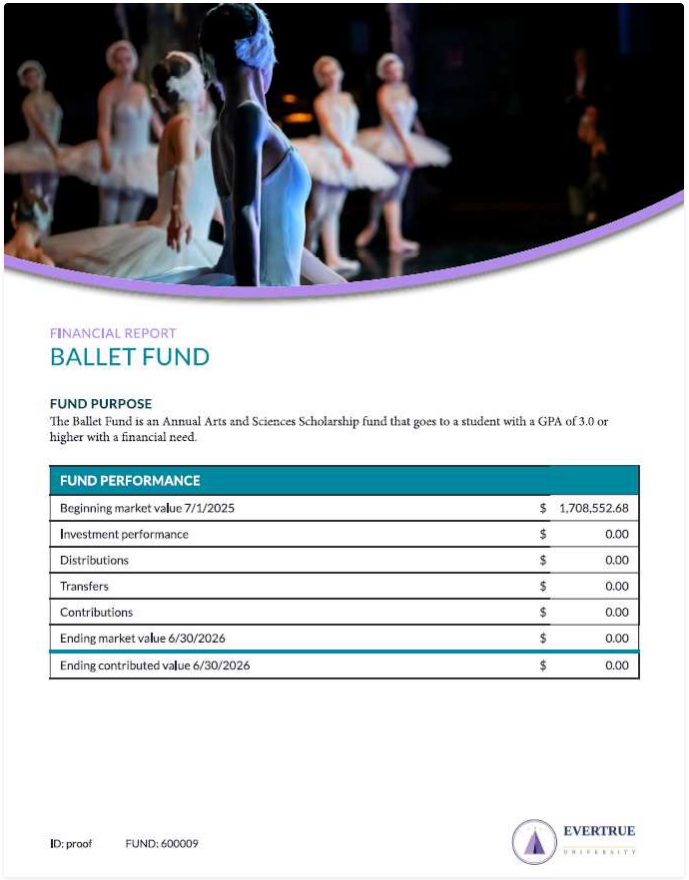
Fund header photo is required and must be sized exactly to 2625 × 1380 pixels and be a JPG, JPEG, or PNG.

Footer logo should be a PNG on a transparent background sized to fit 600 × 195 pixels.

ABILITY TO COLLECT BY FUND/RECIPIENT

Yes — 1 per template.

Images must be optimized to 300 DPI for best print quality.



FINANCIAL REPORT

BALLET FUND

FUND PURPOSE

The Ballet Fund is an Annual Arts and Sciences Scholarship fund that goes to a student with a GPA of 3.0 or higher with a financial need.

FUND PERFORMANCE		
Beginning market value 7/1/2025	$	1,708,552.68
Investment performance	$	0.00
Distributions	$	0.00
Transfers	$	0.00
Contributions	$	0.00
Ending market value 6/30/2026	$	0.00
Ending contributed value 6/30/2026	$	0.00

ID: proof FUND: 600009

EVERTRUE

Recipient List

COPY

Heading is the fund name pulled in from Balance and is always all caps. You control the heading and subheading shown above the list of recipients.

Heading should be 40–50 characters with spaces; subheading should be 40–50 characters with spaces.

This page's content updates dynamically according to recipient details collected through our imports. Please use the import templates we provide and check content for visual consistency.

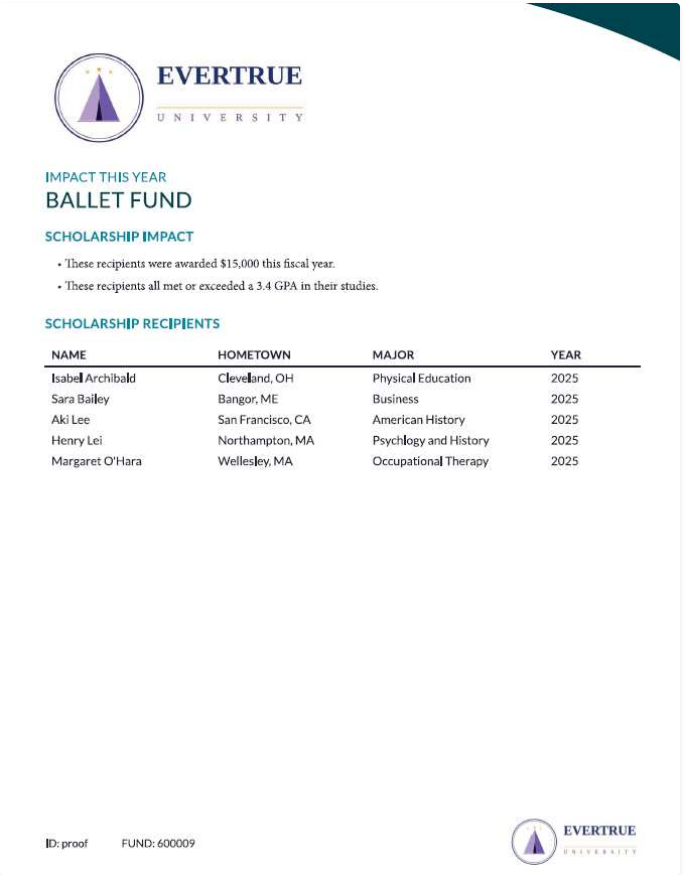
IMAGERY

Header logo should be a PNG on a transparent background, 300 DPI, sized to fit within 600 × 390 pixels.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — sourced from recipient import data associated with each fund.

Images must be optimized to 300 DPI for best print quality.



Question + Answer

COPY

All headings are always all caps. This page is dynamically generated from the recipient impact(s) related to the funds being reported on.

Up to 5 questions are supported. Each question should be 80 characters or fewer with spaces; each answer should be 250 characters or fewer with spaces.

This content can be imported into your Impact site — let us know if you'd like to explore that option.

IMAGERY

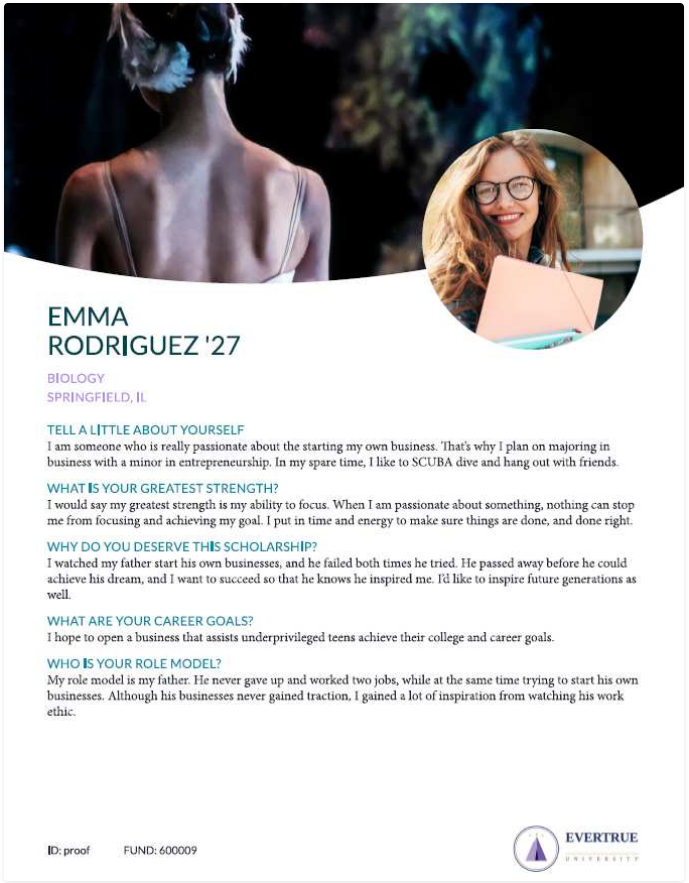
Header photo must be sized to exactly 2625 × 1290 pixels (1 per template).

Recipient circle photo (optional default) must be sized to 840 × 840 pixels and be a JPG, JPEG, or PNG (1 per recipient, defaults available).

ABILITY TO COLLECT BY FUND/RECIPIENT

Yes — header photo is 1 per template; circle photo is 1 per recipient (default available).

Images must be optimized to 300 DPI for best print quality.



Thank You Horizontal

COPY

Heading is the fund name pulled in from Balance and is always all caps.

Message content (justified by default) with an optional associated image is added dynamically from recipient impact(s) tied to the funds being reported on.

Personal letter/statement can run up to 1,800 characters with spaces across up to 5 paragraphs.

We can enable bulk import of these impacts — let us know if you'd like to do this.

IMAGERY

Header image must be sized to exactly 2625 × 1650 pixels and be a JPG, JPEG, or PNG (1 per recipient, default available).

ABILITY TO COLLECT BY FUND/RECIPIENT

Yes — 1 per recipient (default available).

Images must be optimized to 300 DPI for best print quality.



BALLET FUND

Dear Friend of the Whitfield Family Scholarship, I still remember opening the email that told me I'd been selected to receive this scholarship. I read it three times before it felt real, and then I called my mom right away because I knew she'd want to celebrate with me. Thank you, from the bottom of my heart, for your generosity and for believing in students like me.

This scholarship has changed the trajectory of my college experience in ways I don't think I can fully put into words. Before receiving this award, I was working two part-time jobs just to cover textbooks and lab fees, which left very little time or energy for the research opportunities I came to college hoping to pursue. Your support lifted that weight off my shoulders. This past semester, I was able to cut back my hours and join Dr. Alvarez's cellular biology lab, where I've spent countless afternoons running assays and learning techniques I used to only read about in textbooks.

I'm currently working toward a degree in Biology with a minor in Chemistry, and I hope to pursue a PhD in molecular biology after graduation.

The research experience your scholarship made possible has only sharpened that goal. Just last month, our lab identified a promising pattern in cell response data that our team is now preparing to submit for publication, and I got to be part of that process from the very beginning. I don't think I would have had the bandwidth to take on that opportunity without the financial breathing room this scholarship provided.

Beyond the lab, this scholarship has given me the chance to actually enjoy being a student. I've joined the campus Science Outreach Club, where we bring hands-on experiments to local elementary schools, and I've started mentoring a first-year student who is navigating the same financial pressures I once faced. I want to pass along the kind of support you gave me.

Thank you again for investing in my education and in my future. I promise to make the most of this gift, both in the classroom and in the lab, and I hope to one day be in a position to support a student the way you have supported me. With sincere gratitude and appreciation,

EMMARODRIGUEZ'27

ID: proof FUND: 600009

EVERTRUE

Thank You Vertical

COPY

Heading is the fund name pulled in from Balance and is always all caps. If the fund name is too long, it is replaced with a "Thank You" heading.

This page is built dynamically using recipient impact content and optional imagery. Add a default image to use when individual recipient images don't exist.

Personal letter/statement can run up to 1,000 characters with spaces across up to 4 paragraphs.

These recipient impacts can be imported in bulk — let us know if you'd like to explore that option.

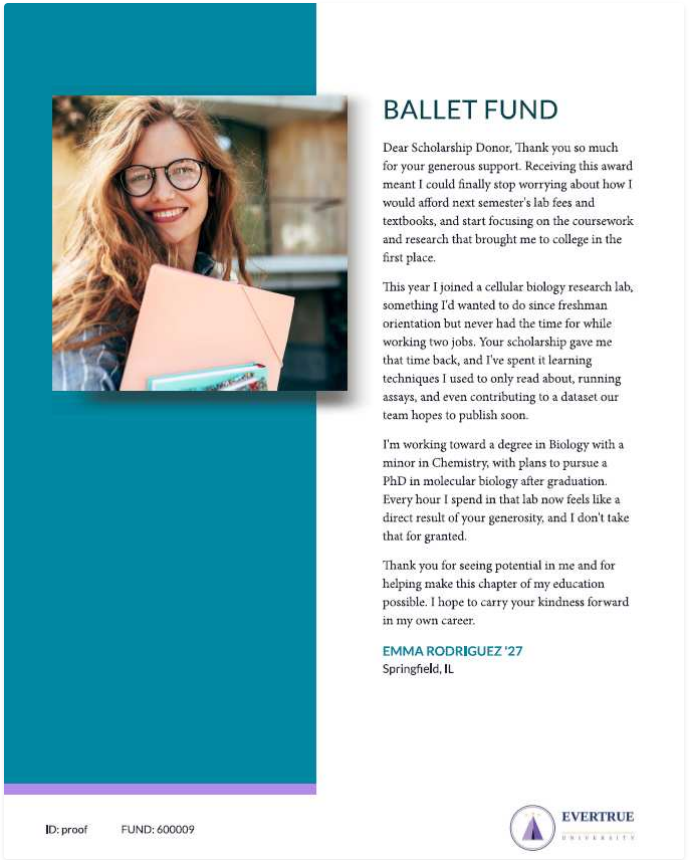
IMAGERY

Header image must be sized to exactly 2625 × 1650 pixels and be a JPG, JPEG, or PNG (1 per recipient, default available).

ABILITY TO COLLECT BY FUND/RECIPIENT

Yes — 1 per recipient (default available).

Images must be optimized to 300 DPI for best print quality.



Narrative + Quote

COPY

Heading is the fund name pulled in from Balance and is always all caps.

Copy and an optional associated image are added dynamically based on the recipient impact(s) tied to the funds being reported on.

Narrative/statement can run up to 800 characters with spaces across up to 4 paragraphs; the quote should be 300 characters or fewer with spaces.

We offer bulk import of copy and imagery — let us know if you're interested.

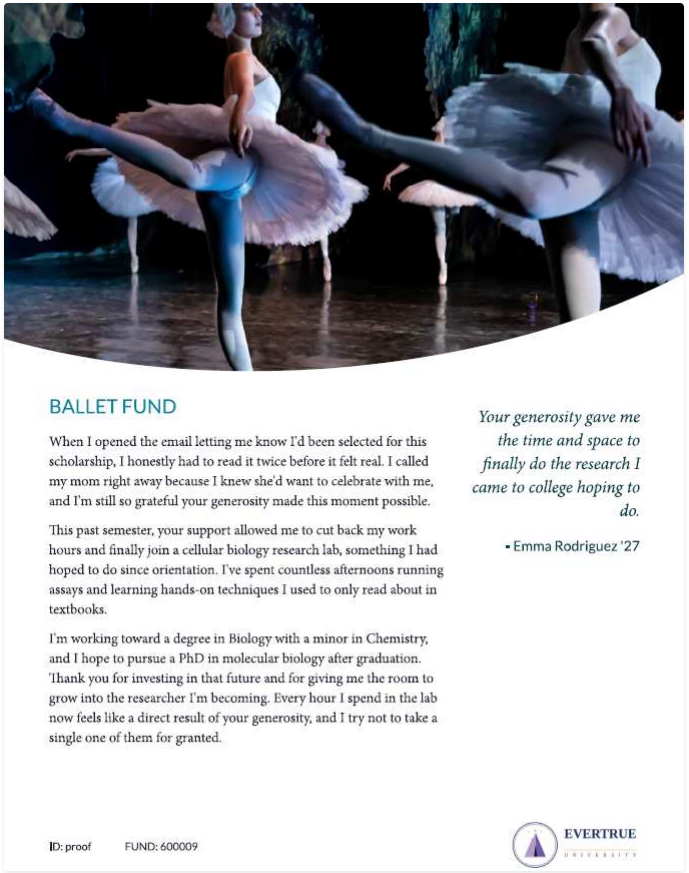
IMAGERY

Header image must be sized to exactly 2625 × 1650 pixels and be a JPG, JPEG, or PNG (1 per recipient, default available).

ABILITY TO COLLECT BY FUND/RECIPIENT

Yes — 1 per recipient (default available).

Images must be optimized to 300 DPI for best print quality.



Glossary

COPY

Terms and explanations for the stewardee. This is a static page that will be the same for all reports using this template.

Up to 10 terms are supported. Each term should be 70 characters or fewer with spaces; each definition should be 200 characters or fewer with spaces.

Set up in two columns by default.

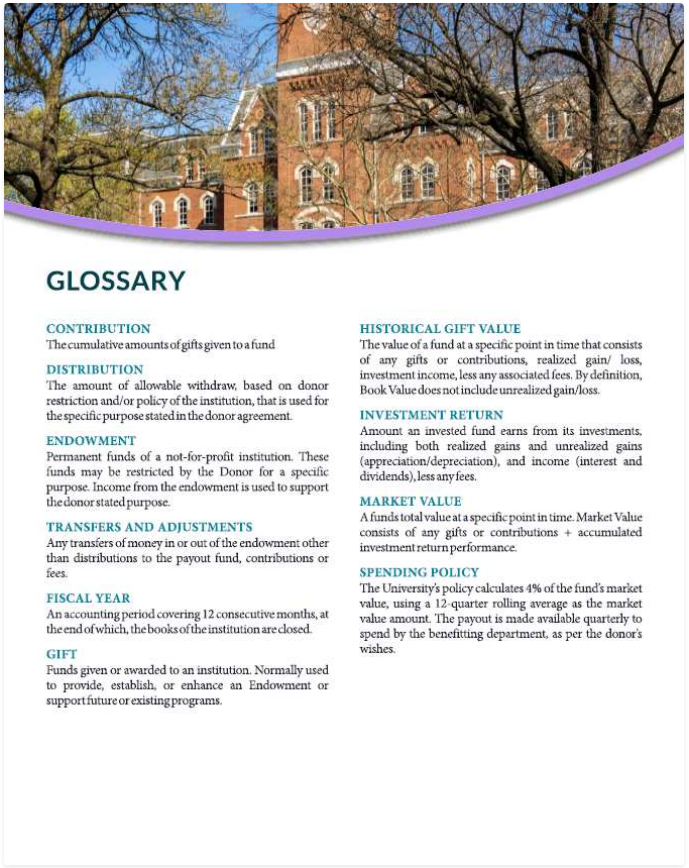
IMAGERY

Header photo must be sized to exactly 2625 × 1380 pixels and be a JPG, JPEG, or PNG.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — static template content.

Images must be optimized to 300 DPI for best print quality.



GLOSSARY

CONTRIBUTION
The cumulative amounts of gifts given to a fund

DISTRIBUTION
The amount of allowable withdraw, based on donor restriction and/or policy of the institution, that is used for the specific purpose stated in the donor agreement.

ENDOWMENT
Permanent funds of a not-for-profit institution. These funds may be restricted by the Donor for a specific purpose. Income from the endowment is used to support the donor stated purpose.

TRANSFERS AND ADJUSTMENTS
Any transfers of money in or out of the endowment other than distributions to the payout fund, contributions or fees.

FISCAL YEAR
An accounting period covering 12 consecutive months, at the end of which, the books of the institution are closed.

GIFT
Funds given or awarded to an institution. Normally used to provide, establish, or enhance an Endowment or support future or existing programs.

HISTORICAL GIFT VALUE
The value of a fund at a specific point in time that consists of any gifts or contributions, realized gain/ loss, investment income, less any associated fees. By definition, Book Value does not include unrealized gain/loss.

INVESTMENT RETURN
Amount an invested fund earns from its investments, including both realized gains and unrealized gains (appreciation/depreciation), and income (interest and dividends), less any fees.

MARKET VALUE
A funds total value at a specific point in time. Market Value consists of any gifts or contributions + accumulated investment return performance.

SPENDING POLICY
The University's policy calculates 4% of the fund's market value, using a 12-quarter rolling average as the market value amount. The payout is made available quarterly to spend by the benefitting department, as per the donor's wishes.

Back Cover

COPY

This is a static page that will be the same for all reports using this template.

Up to 5 address lines are supported, each 45 characters or fewer with spaces; closing descriptive should be 250 characters or fewer with spaces.

IMAGERY

Background photo must be sized to exactly 2625 × 3375 pixels and be a JPG, JPEG, or PNG.

Logo (light version) should be a transparent PNG sized to fit 600 × 420 pixels. Since the logo sits on the organization's primary color, any primary color in the logo will fade into the background — we suggest an all-white or all-black version here.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — static template content.

Images must be optimized to 300 DPI for best print quality.

