IMPACT · TEMPLATE GUIDE

Classic 2.1 Template Guide

Version 2.1 · November release

How to Use This Guide

CHARACTER COUNTS ARE GUIDANCE

Counts in this guide are recommended starting points, not hard limits. Font choice, heading length versus body length, and paragraph breaks all change how much fits on a page, so two templates with the same character count can render differently.

Check as you build

PREVIEW WARNINGS

The report template preview now warns you when content does not fit on a page. Use the preview, not the character count alone, to confirm your content fits before generating reports.

IMAGE SIZES

Image dimensions listed on each page match what the application expects. Optimize all images to 300 DPI for best print quality.

Missing images

NO GREY PLACEHOLDER

When an image is missing on the Leadership Message, Question + Answer, Statistics, Endowment Performance, or Thank You (vertical) pages, the page renders without an image instead of showing a grey box.

DEFAULT RECIPIENT PHOTO

Set a default recipient photo on the report template. Thank You (vertical) uses it when a recipient has no photo of their own. With no recipient photo and no default, the page renders without an image.

Template-wide options

PAGE ORDER

Template pages and fund package pages can be enabled and reordered. The Content tab lists enabled pages only, and content on a disabled page is kept. See the Knowledge Base article on page ordering.

JUSTIFICATION

Text on the Leadership Message, Overview, Flex, Awardee, and Glossary pages is justified by default. Left-aligned text is available by request — see System Settings.

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.

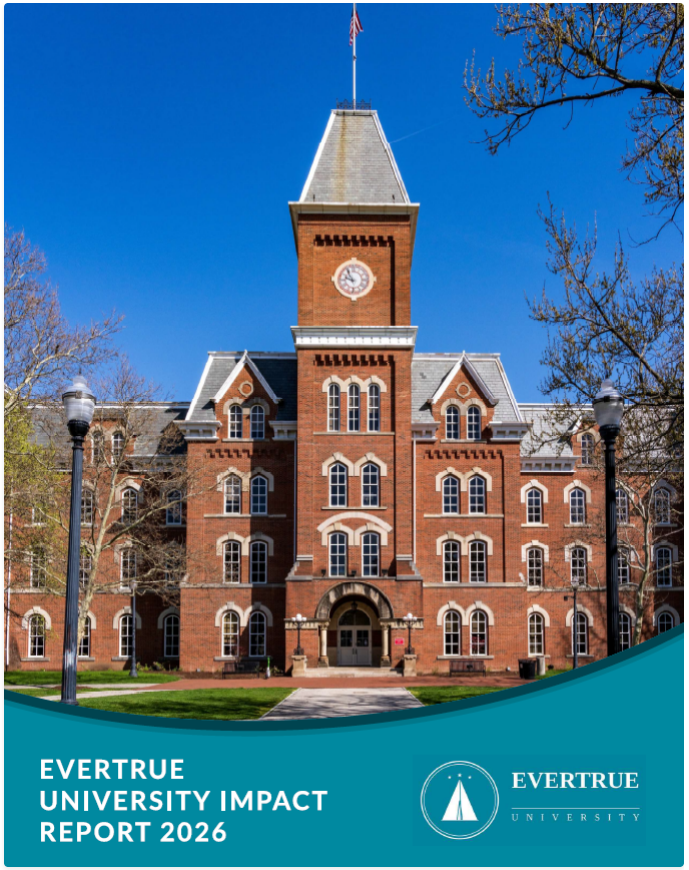
TEXT COLOR

Text on the primary color background uses the Primary Background Text Color, set in Manage Designs & Colors under Default colors.

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.

IF AN IMAGE IS MISSING

With no headshot, the page renders without an image instead of a grey box. Text is justified by default. Left-aligned text is available by request through the Support team.

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.

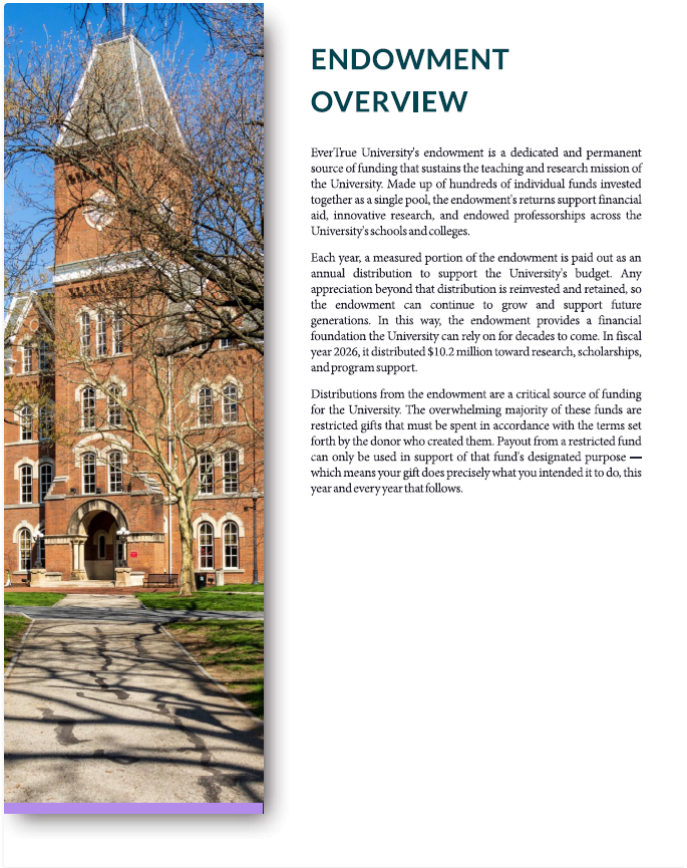
HEADING & JUSTIFICATION

The heading now uses the full text width, so slightly longer headings fit on one line. Text is justified by default. Left-aligned text is available by request through the Support team.

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, avoid text inside these images, such as titles or labels. Put that wording in the statement body instead.

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.

IF AN IMAGE IS MISSING

A missing chart image renders as blank space instead of a grey box.

TEXT COLOR

Text on the secondary color background uses the Secondary Background Text Color, set in Manage Designs & Colors under Default colors.

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.

JUSTIFICATION

Text is justified by default. Left-aligned text is available by request through the Support team.

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.

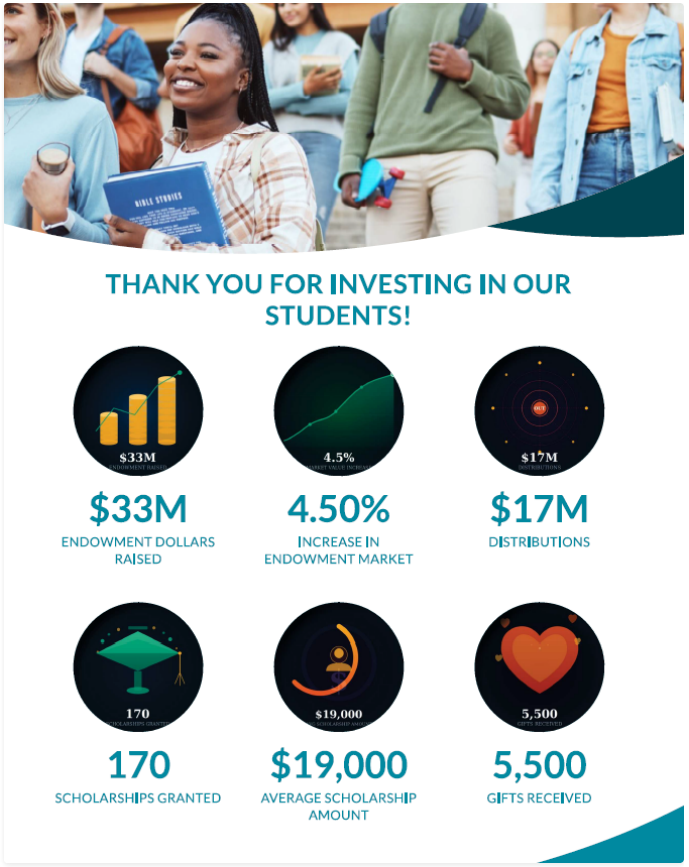
IF AN IMAGE IS MISSING

A missing circle photo renders without an image instead of a grey box.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — static template content.

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



Financial Pages

COPY

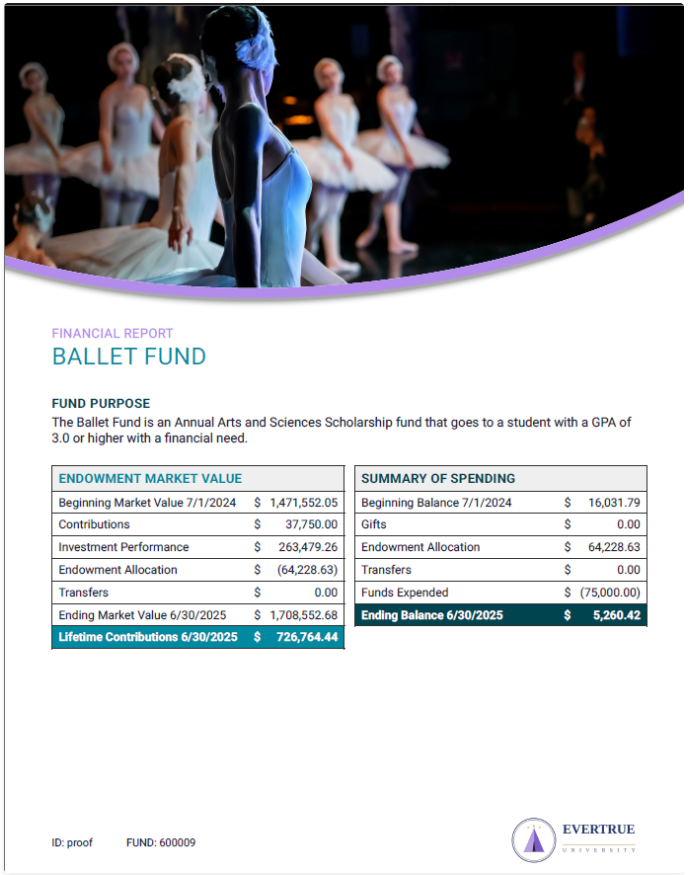
There are multiple versions of this page, chosen during onboarding and setup. The version shown is for customers reporting both Endowment and Expendable Funds, with an Endowment Market Value table and a Summary of Spending table.

We can also support Expendable Only reporting, which shows only the spending activity and no endowment activity. Let us know if you would like this version.

Most content here is added dynamically to a report based on the funds being reported on. The fund name and fund narrative come directly from the Fund Name and Fund Narrative fields in Balance. The fund name pulled in from Balance is always all caps.

Fund Name should be limited to 250 characters maximum with spaces; Fund Narrative should be limited to 500 characters maximum with spaces. These are guidance — use the preview to confirm your content fits on the page.

The labels above the fund name ("Financial Report" in the sample) and above the fund narrative ("Fund Purpose" in the sample) can be updated by customers. They are managed on the report template, apply to every report that uses it, and should each be 40–50 characters with spaces.



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.

ENDOWMENT MARKET VALUE	
Beginning Market Value 7/1/2024	$ 1,471,552.05
Contributions	$ 37,750.00
Investment Performance	$ 263,479.26
Endowment Allocation	$ (64,228.63)
Transfers	$ 0.00
Ending Market Value 6/30/2025	$ 1,708,552.68
Lifetime Contributions 6/30/2025	**$ 726,764.44**

SUMMARY OF SPENDING	
Beginning Balance 7/1/2024	$ 16,031.79
Gifts	$ 0.00
Endowment Allocation	$ 64,228.63
Transfers	$ 0.00
Funds Expended	$ (75,000.00)
Ending Balance 6/30/2025	**$ 5,260.42**

ID: proof FUND: 600009

EVERTRUE UNIVERSITY

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.

FOOTER: CONSTITUENT ID & FUND ID

The footer shows the Constituent ID and Fund ID by default. These are internal identifiers, so if you do not want donors to see them, contact Support to turn the footer off.

This is a system setting, not a template editor option. See System Settings at the end of this guide.

The change applies to newly generated reports; previously generated reports are not changed. Your footer logo is not affected.

ABILITY TO COLLECT BY FUND/RECIPIENT

Yes — 1 per template.

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

Financial Pages: Non-Default Settings

WHAT THIS SAMPLE SHOWS

The previous page shows the default: fund name only in the heading, with the Constituent ID and Fund ID in the footer. This sample shows the same page with both system settings changed from their defaults.

FUND ID WITH THE FUND NAME

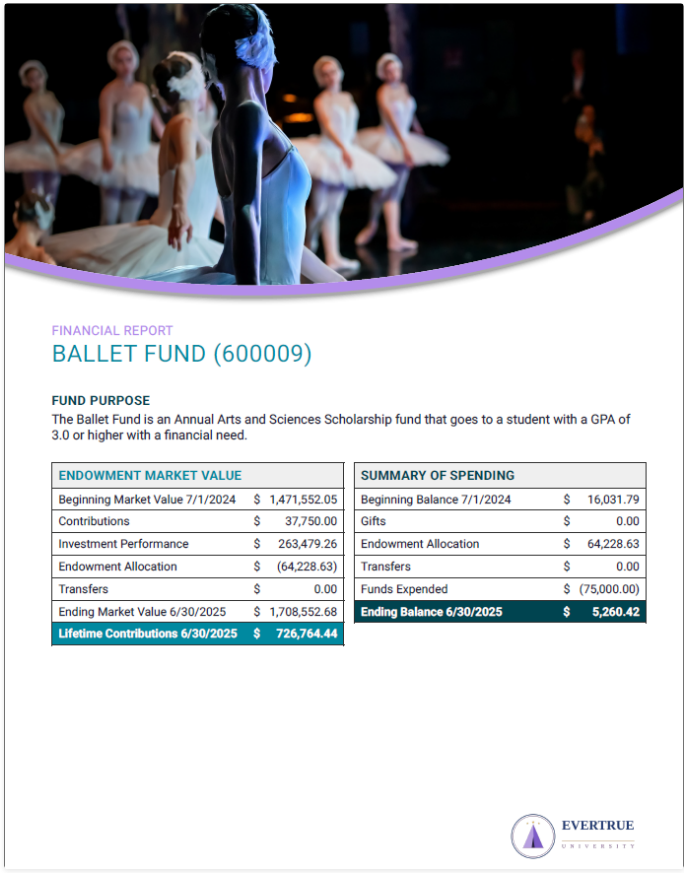
When turned on, the Fund ID is shown as part of the fund name on the package, for example BALLET FUND (600009). It also applies to the Recipient List, Thank You Horizontal, Thank You Vertical, and Narrative + Quote pages.

FOOTER IDS OFF

When turned off, the Constituent ID and Fund ID no longer appear in the footer of the fund financial report package. The footer logo stays.

HOW TO REQUEST A CHANGE

Both are system settings, not template editor options. Contact Support with your template name and the setting you want changed. See System Settings at the end of this guide.



FINANCIAL REPORT

BALLET FUND (600009)

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.

ENDOWMENT MARKET VALUE	
Beginning Market Value 7/1/2024	$ 1,471,552.05
Contributions	$ 37,750.00
Investment Performance	$ 263,479.26
Endowment Allocation	$ (64,228.63)
Transfers	$ 0.00
Ending Market Value 6/30/2025	$ 1,708,552.68
Lifetime Contributions 6/30/2025	**$ 726,764.44**

SUMMARY OF SPENDING	
Beginning Balance 7/1/2024	$ 16,031.79
Gifts	$ 0.00
Endowment Allocation	$ 64,228.63
Transfers	$ 0.00
Funds Expended	$ (75,000.00)
Ending Balance 6/30/2025	**$ 5,260.42**

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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.

If the Fund ID in Fund Name system setting is on, the Fund ID follows the fund name in the heading, for example BALLET FUND (600009). See System Settings at the end of this guide.

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.

CUSTOM COLUMN HEADERS

The table shows four columns by default: Name, Hometown, Major, and Grad year. To relabel a column or hide one, contact Support — headers are set by Support, not in the template editor.

Support enters four comma-separated headings in order. Example: **Name, Hometown, Class Standing + Major, Year**.

Leave a heading blank to hide that column; both the heading and its data are hidden. Example: **Name,,,Year** hides Hometown and Major.

Relabeling changes only the heading text, not the underlying data. Imports keep the standard layout, so update import data to match your new label.

Long headings can wrap to two lines, so review the preview. The setting applies to all reports; headings on a single recipient's pages do not change.

IMAGERY

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

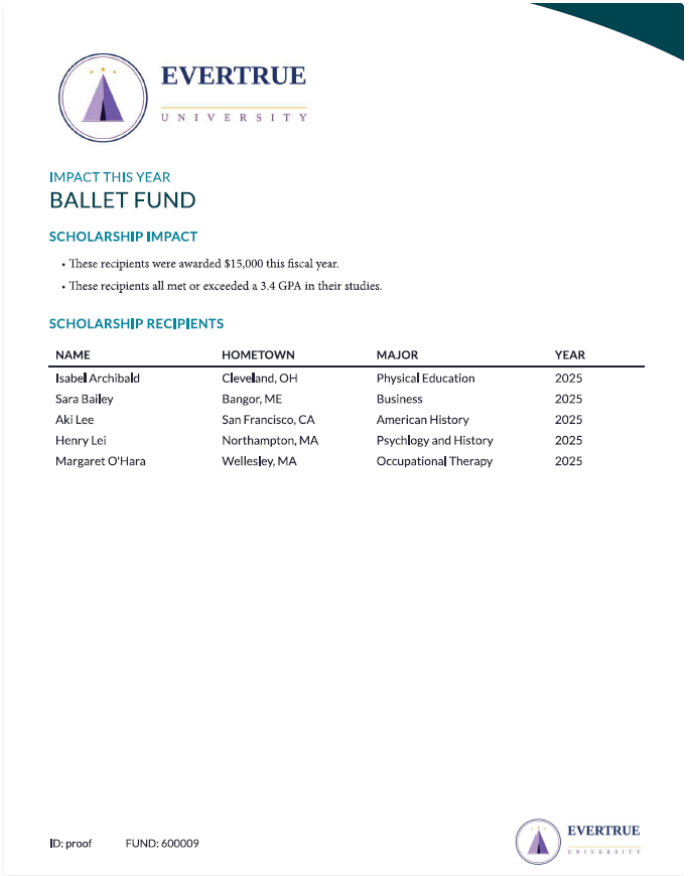
FOOTER: CONSTITUENT ID & FUND ID

The footer shows the Constituent ID and Fund ID by default. To hide them, contact Support to turn the footer IDs off. This is a system setting, not a template editor option; see System Settings at the end of this guide. Your footer logo is not affected.

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).

IF AN IMAGE IS MISSING

With no recipient photo and no default, the page renders without an image instead of a grey box.

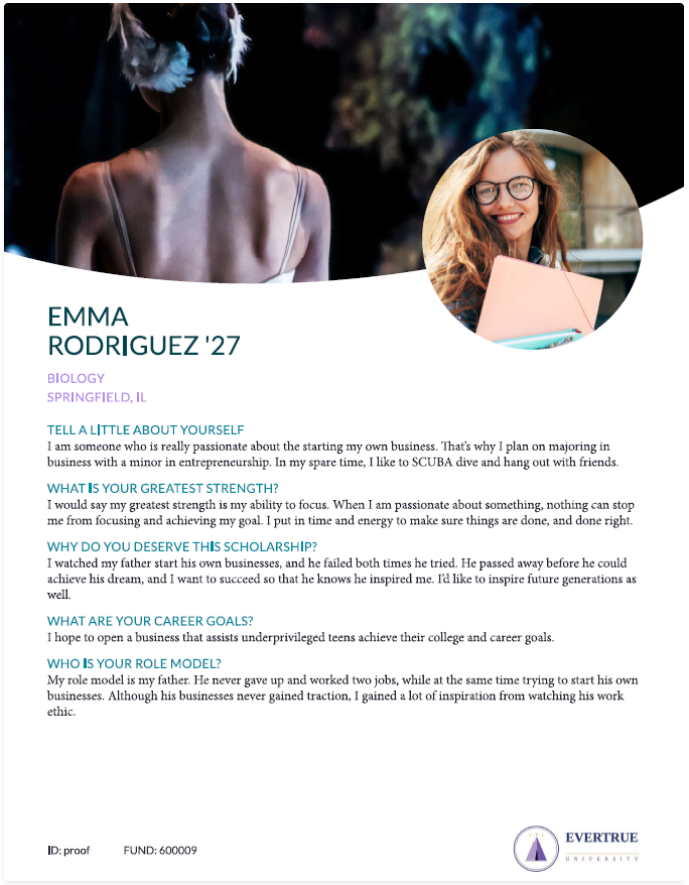
FOOTER: CONSTITUENT ID & FUND ID

The footer shows the Constituent ID and Fund ID by default. To hide them, contact Support to turn the footer IDs off. This is a system setting, not a template editor option; see System Settings at the end of this guide. Your footer logo is not affected.

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.

If the Fund ID in Fund Name system setting is on, the Fund ID follows the fund name in the heading, for example BALLET FUND (600009). See System Settings at the end of this guide.

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 × 1530 pixels and be a JPG, JPEG, or PNG (1 per recipient, default available).

LAYOUT

The heading sits clear of the swoop and photo.

FOOTER: CONSTITUENT ID & FUND ID

The footer shows the Constituent ID and Fund ID by default. To hide them, contact Support to turn the footer IDs off. This is a system setting, not a template editor option; see System Settings at the end of this guide. Your footer logo is not affected.

ABILITY TO COLLECT BY FUND/RECIPIENT

Yes — 1 per recipient (default available).

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



Thank You Vertical

COPY

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

If the Fund ID in Fund Name system setting is on, the Fund ID follows the fund name in the heading, for example BALLET FUND (600009). See System Settings at the end of this guide.

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

Photo must be sized to exactly 1125 × 1200 pixels and be a JPG, JPEG, or PNG (1 per recipient, default available).

DEFAULT RECIPIENT PHOTO

Set the default photo on the report template. It is used when a recipient has no photo. With neither, the page renders without an image.

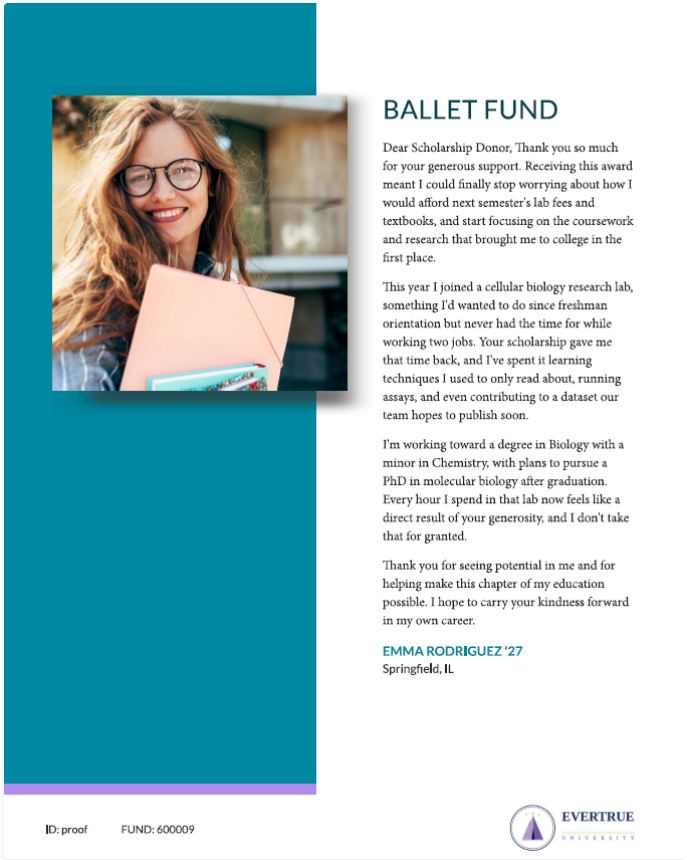
FOOTER: CONSTITUENT ID & FUND ID

The footer shows the Constituent ID and Fund ID by default. To hide them, contact Support to turn the footer IDs off. This is a system setting, not a template editor option; see System Settings at the end of this guide. Your footer logo is not affected.

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.

If the Fund ID in Fund Name system setting is on, the Fund ID follows the fund name in the heading, for example BALLET FUND (600009). See System Settings at the end of this guide.

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).

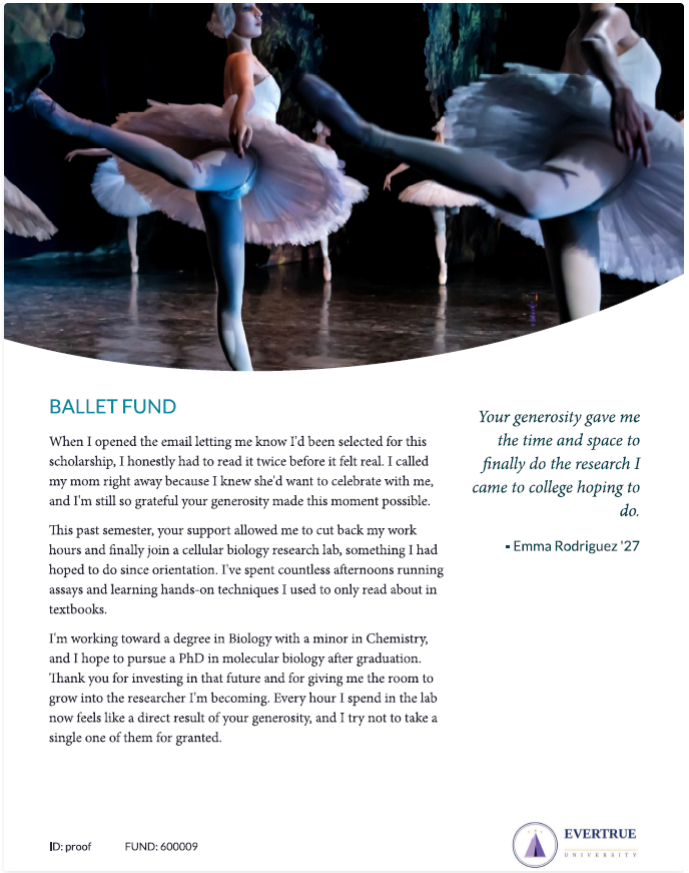
FOOTER: CONSTITUENT ID & FUND ID

The footer shows the Constituent ID and Fund ID by default. To hide them, contact Support to turn the footer IDs off. This is a system setting, not a template editor option; see System Settings at the end of this guide. Your footer logo is not affected.

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.

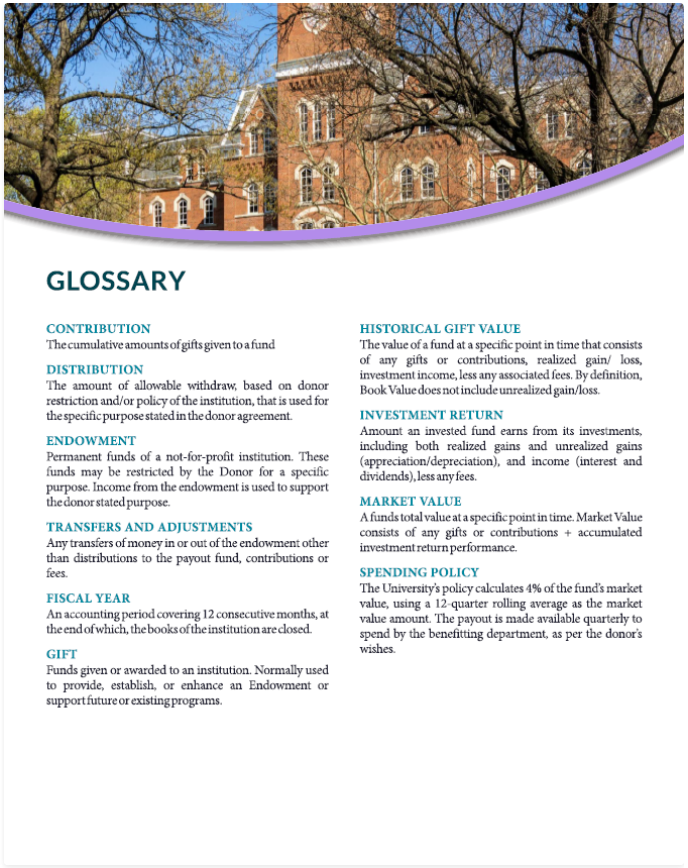
JUSTIFICATION

Text is justified by default. Left-aligned text is available by request through the Support team.

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.

TEXT COLOR

Text on the primary color background uses the Primary Background Text Color, set in Manage Designs & Colors under Default colors.

ABILITY TO COLLECT BY FUND/RECIPIENT

No — static template content.

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



System Settings

HOW TO REQUEST A CHANGE

These options are not in the template editor. Contact Support with your template name and the setting you want changed. Changes apply to newly generated reports.

Text Justification

APPLIES TO

Leadership Message, Overview, Flex, Awardee, and Glossary pages.

DEFAULT

Text is justified. Left-aligned text is available on request.

WHY CHANGE IT

Left-aligned text avoids wide word spacing in narrow columns or short lines.

Footer IDs

APPLIES TO

All Fund Package pages.

DEFAULT

The footer shows Constituent ID and Fund ID.

TO HIDE THEM

Ask Support to turn the footer off so donors do not see internal identifiers. Your footer logo is not affected.

Fund ID in Fund Name

APPLIES TO

The fund name heading on Financial Pages, Recipient List, Thank You Horizontal, Thank You Vertical, and Narrative + Quote pages.

DEFAULT

The fund name is shown without the Fund ID.

TO SHOW IT

Ask Support to show the Fund ID with the fund name, for example BALLET FUND (600009).

Recipient List Headers

APPLIES TO

Recipient List page.

DEFAULT

Name, Hometown, Major, Grad year.

TO CHANGE

Give Support four headings in order, separated by commas. Leave one blank to hide that column and its data.

Formatting & Printing Notes

Text

LINE BREAKS

Press Enter in template text to add a blank line. Typing <br> also still works through 2026. Any other HTML typed into template text displays as plain text.

SPECIAL CHARACTERS

Support is rolling out in phases: template pages first, then fund name and purpose, then recipient data. Check with Support before relying on special characters in recipient data.

FONTS

Supported fonts:
Garamond
Lato (template default)
Minion Pro
PT Sans*
Roboto

* Added since the initial template.

We can add additional Google-licensed fonts upon request. Contact Support.

Color

TEXT ON BRAND COLORS

Manage Designs & Colors now includes a Primary Background Text Color and a Secondary Background Text Color under Default colors. Text on those backgrounds uses them instead of white, so light brand colors stay readable. The Primary Background Text Color applies to the Front Cover and Back Cover; the Secondary Background Text Color applies to Endowment Performance.

LOGOS ON PRIMARY COLOR

Logos placed on the primary color should be all-white or all-black so they do not fade into the background.

Printing

SLIGHT COLOR SHIFT

Transparent logos and the cover swoop shadow can print a slightly different shade on solid backgrounds. Workaround: use Print As Image in Acrobat.