



The
**COMMUNITY
FOUNDATION**
of the New River Valley

ONLINE DONOR PORTAL INFORMATION AND USER GUIDELINES

The Community Foundation of the New River Valley (CFNRV) strives to provide its endowed fund holders with informative and relevant information on their fund activity, giving opportunities, and community needs. To that end, fund holders may access information about recent gifts, grants, investment growth, and fees associated with their fund through an online donor portal: **Foundant Community Suite Fund Advisor Online Access**.

When signing up to use the online donor portal via the **Donor Portal Opt-In Form**, fund holders confirm that they have read and agree to the information and user guidelines below. Please review this information carefully and contact the CFNRV at 540.381.8999 or at cfnrv@cfnrv.org with questions.

Information Available Through the Donor Portal

Through the portal, fund holders will be able to view information about both the endowed and pass-through components of their funds. They will be able to:

- View the current fund balance and the spendable balance (the amount available to award in grants or scholarships)
- View contributions and grants made on or after January 1, 2010. Contribution and grant information made prior to 2010 may be requested from the CFNRV staff.
- View annual fund statements including administrative fees and investment returns
- View relevant files, such as copies of the fund agreement
- Recommend grants to qualified charitable organizations (Donor-Advised Funds only)
- Make an online contribution via credit or debit card. Credit card transaction fees will apply.

Information Accuracy and Statements

The CFNRV practices strong financial stewardship and strives to provide the most timely and accurate information to fund holders. Users of the online donor portal should be aware of the following:

- Contributions made via check will be dated on the day the check is deposited to the CFNRV bank account. Deposits are typically made at least once a week.
- Contributions made online via credit/debit card or via echeck will be dated on the day the gift was made online.

- Financial information within the portal for the current calendar year has not been audited. Copies of the CFNRV's most recent audited financial statements are available to view and download at cfnrv.org/about/financial-information/.
- The CFNRV reconciles its records with bank statements on a monthly basis. As such, contributions and grants listed in the donor portal made within the last month have not yet been reconciled and are not final. This is particularly important for contributions made online via the donor portal, the CFNRV website, or the GiveBigNRV website as the credit card processing company may hold funds, decline a transaction, or assign a different gift date that the CFNRV only discovers and rectifies through the reconciliation process.
- Investment earnings are allocated to endowed funds on a quarterly basis. Investment earnings for the previous year can be found in the annual fund statement available to view and download through the donor portal.
- Annual fund statements for 2017 were sent by mail this past May. The first fund statement to appear in the donor portal will be for 2018, and will be available in April 2019. You may request another copy of the 2017 annual fund statement by contacting the CFNRV office.

Donation Information & Confidentiality

The CFNRV respects the privacy of all its donors. As such, fund holders should be aware of the following:

- Contributions within the portal will only show the donor's name, donation amount, and date of the donation. The CFNRV will not supply the mailing address, phone number, email, or other identifying information.
- Donors who have made gifts anonymously will be listed simply as "Anonymous" within the donor portal. The CFNRV will not provide the donor's name or other identifying information to fund holders.
- By completing the **Donor Portal Opt-In Form**, fund holders agree that all contribution information, including donor names and donation amounts, will remain confidential. Giving circles, county-based funds, or other donor groups for which there are multiple members contributing to and advising on use of the fund agree to share donor information only with the members of that fund or circle and not with the public.
- Given the volume of gifts made to CFNRV funds, donors will not receive email notifications when gifts or grants are made either from the donor portal itself or from online giving systems such as GiveBigNRV. Instead, donors should login to the donor portal to review any recent transactions and contact the CFNRV staff with questions.

Additional Guidelines for Giving Circles, County-Based Funds, and/or Donor Groups

The CFNRV works with a variety of giving circles, county-based funds, and other donor groups to grow endowed funds and award grants and scholarships. To insure timely, accurate communication each group should:

- Identify a single individual authorized to use the donor portal on behalf of the fund, including viewing fund activity and making grant recommendations in the case of donor advised funds.
- This individual will also be the main point of contact for the fund for all other written or oral communication to or from the CFNRV.
- This individual must be identified in writing and provide his/her mailing address, phone number, and email address to the CFNRV. This may be done by letter or by completing the Successor Advisor Form in the case of donor-advised funds. The individual must also indicate whether they are the authorized contact for a specific period of time (e.g. one year) or indefinitely.

Confirmation of Review and Agreement

I, _____, understand and agree to the information and guidelines above for use of the Community Foundation of the New River Valley's Online Donor Portal. I understand that the CFNRV reserves the right to modify these guidelines at any time, and will notify me electronically of such modifications. I also understand that the CFNRV may suspend or terminate my ability to access the Online Donor Portal at any time, with or without cause.

Printed Name

Title (if applicable)

Signature

Date

Name of Endowed Fund (s) to be Accessed via the Online Donor Portal:

For staff use only:

Date Received:

By: