



Membership Form

Yes, we would like to join the CF Insights community as members!

1. Indicate if you are a new or renewing member:

- Renewing Member New Member

Member Information

2. Complete the contact information for your membership,

Member Foundation Name:	_____
Member Foundation Address:	_____
City:	_____ State: _____ Zip: _____
Primary Contact:	_____
Title:	_____
Email:	_____ Phone: _____
Secondary Contact:	_____
Title:	_____
Email:	_____ Phone: _____
Billing Contact:	_____
Title:	_____
Email:	_____ Phone: _____

Membership Dues

3. Enter total asset size at the close of your most recent fiscal year:

\$ _____

4. Calculate membership dues based on asset size and record amount (visit CFINSIGHTS.ORG for a dues calculator)

\$ _____

Membership Agreement

5. Read the CF Insights membership agreement and sign here indicating that you agree to the terms of membership.

Authorized Signature

Date

Print Name

Title

6. Return this completed form and your annual dues to CF Insights at:

Candid
Attn: CF Insights
32 Old Slip, 24th Floor
New York, NY 10005

1. Terms of Membership

- a. Membership requirement consists of (1) payment of the annual fee, (2) provision of member's current financial data as described below, and (3) agreement to abide by the terms of this agreement.
- b. A membership term is for one year from the date on which the membership becomes active and is renewable subject to the agreement of the parties.
- c. Members are entitled to technical support, without charge, to assist them in entering their data and using the CF Insights software and database to create peer groups and analyze reports. Members are also entitled to an annual peer benchmarking dashboard report created by CF Insights, basic technical assistance with CF Insights' toolkits, and ongoing guidance from the CF Insights team in accessing and interpreting CF Insights' data. Other services, such as customized analysis, assistance in conducting activity-based costing analysis or scenario planning, or similar specialized services will be charged separately.
- d. CF Insights reserves the right to adjust membership terms at any time, however, such adjustment shall not alter the membership fee or access to CF Insights' services during the current term of membership.
- e. Because timely and accurate data is crucial to the success of this online tool, newly registering members of CF Insights will be provided start up assistance in populating the database and will be offered training each membership year.

2. Software License

- a. Active members will maintain a nontransferable right to use the software during term of membership.
- b. The member's right to use the software is limited to approved use by the employees, directors, and approved contractors serving the member foundation.
- c. Information generated using the software is for internal use by the undersigned foundation staff and board, not for public access, nor for use by any other foundations.
- d. CF Insights may update or modify the software at any time, and may temporarily suspend the system for maintenance as necessary from time to time.

3. Provision and Use of Data

- a. Member foundations agree to provide and update data (unaudited or audited) within 60 days of the close of their fiscal year end, completion of an activity-based costing analysis, or changes to fee schedules.
- b. Member foundations warrant that the information they provide is accurate, and understand that other foundations may rely on this information in generating internal reports and making important economic decisions.
- c. Member foundations will review their own data from time to time to identify any errors and promptly notify CF Insights of inaccuracies.
- d. All data provided by the member foundation remains property of that foundation.
- e. CF Insights will not permit access to any data which would identify the compensation level of any specific individual or foundation. Compensation data will only appear in aggregate or as a component of a ratio that is displayed in the CF Insights database reports or research. CF Insights will not create charts or tables for the Web site that draw on disaggregated compensation data.
- f. The CF Insights database is fully open to members. Members acknowledge that their data will be identifiable to other members using the comparative features of the database. Members also acknowledge that their data may be used by CF Insights and Candid to demonstrate the database and data outputs to potential members or funders. Candid, through the auspices of CF Insights with oversight provided by the advisory board, may generate articles and/or other published reports either for other community foundations or for the public, that present analysis of aggregate data from the database. No data beyond what is collected for the Columbus Survey will be presented in broadly disseminated reports for any identifiable foundation without express prior written consent of that foundation. The advisory board will set parameters for any communication between Candid/CF Insights and the media relative to CF Insights data.

4. Confidentiality

- a. Member foundations understand that the data in the database is confidential and is not to be shared outside the foundation without advance written permission from CF Insights.
- b. Members will not produce any publicly available reports, nor provide CF Insights comparative reports (other than member's own data) to the media without advance written permission from CF Insights.

5. Release of Liability

- a. CF Insights will use its best efforts to maintain the accuracy of the data in the database, but is dependent on the various member foundations to provide timely and accurate data, and cannot independently verify the data in the database. As a result, CF Insights makes no warranty as to the accuracy or timeliness of the data.
- b. Member foundations hereby agree to release and indemnify CF Insights from any liabilities associated with the inaccuracy of the data or the malfunction of the software. CF Insights will use its best efforts to resolve any malfunctions of the software in a timely manner. CF Insights shall not be liable for the economic or other consequences of any decisions made by member foundations in reliance on the reports generated by the CF Insights software and database.