




**OPERATING PROJECT**

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# **ONBOARDING TRAINING**

 (719) 260-1213

 [info@newhorizonsfoundation.com](mailto:info@newhorizonsfoundation.com)

 [www.newhorizonsfoundation.com](http://www.newhorizonsfoundation.com)

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# **WELCOME** *to* *the* **FOUNDATION!**



I would like to personally welcome you to the team!

It is so great to have you join our team as we partner with you to impact this world. Together, we will impact every sphere of society in every nation by meeting the needs of thousands of people all over the world!

In establishing an Operating Project at The New Horizons Foundation, you will receive personalized service from a caring staff with over 30 years of experience who will help to ensure that your charitable vision is achieved. Our website allows you to have secure on-line access to your project information from anywhere in the world, to monitor contributions, grants, and account activity. We are here to assist you in whatever way we can.

We look forward to partnering with you to impact this world!



**Dr. Steve Prensner**

President & CEO  
THE NEW HORIZONS FOUNDATION

# OUR MISSION AND VISION



Operating for  
over 30 years

48 STATES



132 COUNTRIES



95% of giving goes directly  
to charitable programs



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## MISSION

To develop and support creative charitable enterprises  
that bring lasting change to our world for the better.



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## VISION

To impact every sphere of society in every nation by having  
hundreds of projects meeting the needs of thousands of people,  
raising millions of dollars to bring priceless value to the world.



# OUR CORE VALUES



## Partnerships

We pursue partnerships and collaboration with others of like vision.



## Integrity

We will properly take care of all the details. We are comprehensive, trustworthy, and reliable so that you can have peace of mind.



## Innovation

We will help you find a way. We specialize in developing fresh, new ideas and creative solutions for both simple and complex problems.



## Leadership

We strive to help leaders achieve their full potential and life purpose.



## Impact

We want all of our projects, initiatives, and activities to have maximum positive impact for their intended purposes.



## Excellence

We pursue excellence in our service and all we do, providing overwhelming value.



# MEET *the* EXECUTIVE TEAM



Our team has been helping individuals accomplish their charitable objectives in religious, educational, scientific, benevolent, and health related activities for over 30 years!



**Steve Prensner**

President,  
& CEO



**Bill Mortiz**

Founder,  
Vice President,  
& Executive Director



**Greg Smith**

Director of  
Outreach





**SCAN THE CODE ABOVE ON  
YOUR PHONE TO MEET THE  
REST OF THE TEAM!**



**Darius Rotea**

Director of  
Operations



**Chris Rosenhahn**

Director of  
Finance



# PARTNERING

## FOR WORLD

### Growing Your Vision with New Horizons

The New Horizons Foundation structure is a fiscal sponsor, designed to help your vision grow to its fullest potential.

Like a greenhouse, our organization provides structure and protection that allows your project to grow at your own pace. We take a portion of your administrative responsibilities, allowing you to devote more time and energy to the everyday project activity.

Every project underneath New Horizons has a unique purpose and vision that complements our organization's ultimate goal, to impact every pillar of society.





# TOGETHER

## IMPACT

### Impact Every Pillar of Society

We want to impact all nine areas of society in every nation by having hundreds of projects meeting the needs of thousands of people, raising millions of dollars to bring priceless value to the world.

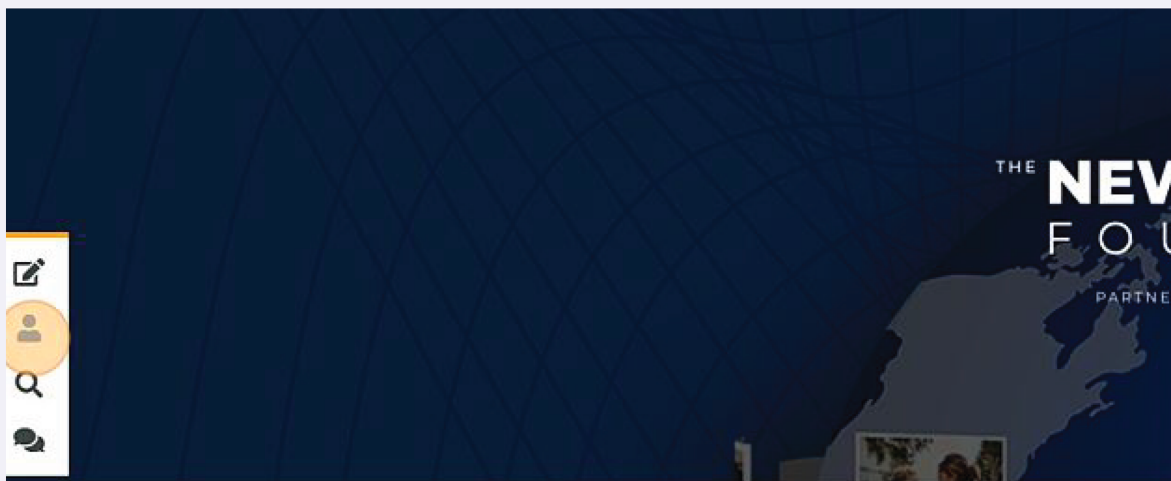




## VIEWING YOUR PORTAL

- 1 Navigate to <https://newhorizonsfoundation.com/>

- 2 To log in, simply select the second icon on the left-hand side tool bar.



- 3 Enter your email and password. If this is your first time logging in, simply select "Forgot Password" to set your password.

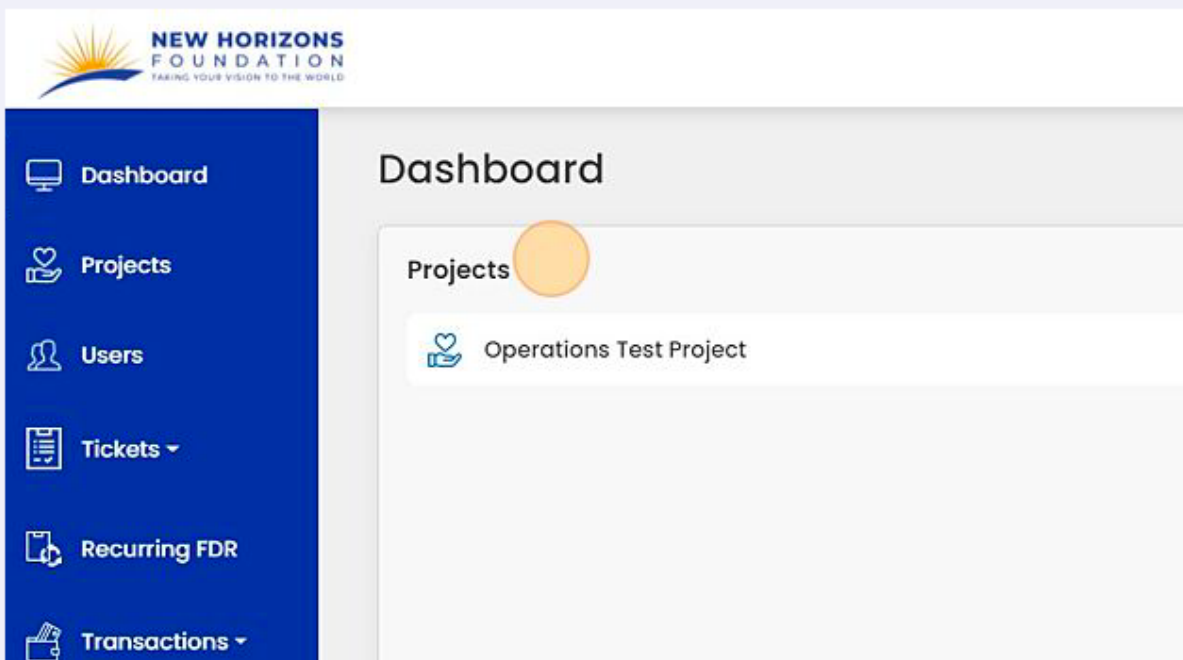
A screenshot of the login page. On the left is a large blue rectangular image. To its right, the heading 'Login' is displayed in a large, bold font. Below the heading is the text 'Enter your details Below'. There are two input fields: the first contains the email address 'info@newhorizonsfoundation.net' and has an envelope icon to its left; the second is for a password, shown as a series of dots, and has an orange circular icon to its left. To the right of the password field is a link that says 'Forgot Password'. At the bottom right is a blue button with the text 'Login'.



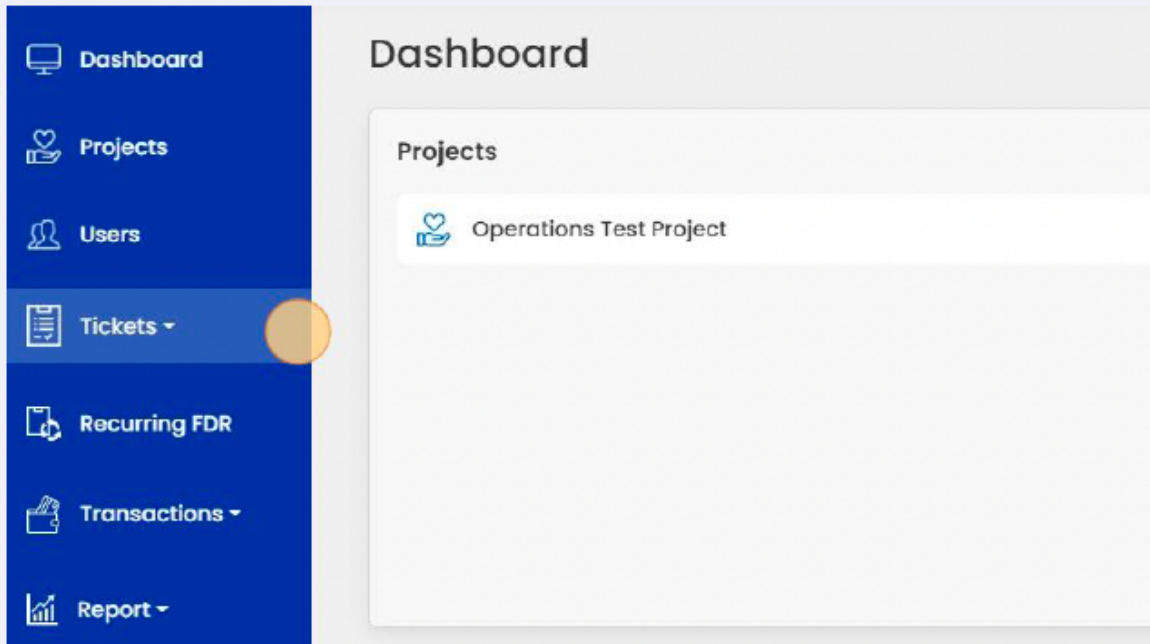
4 Click "Login"



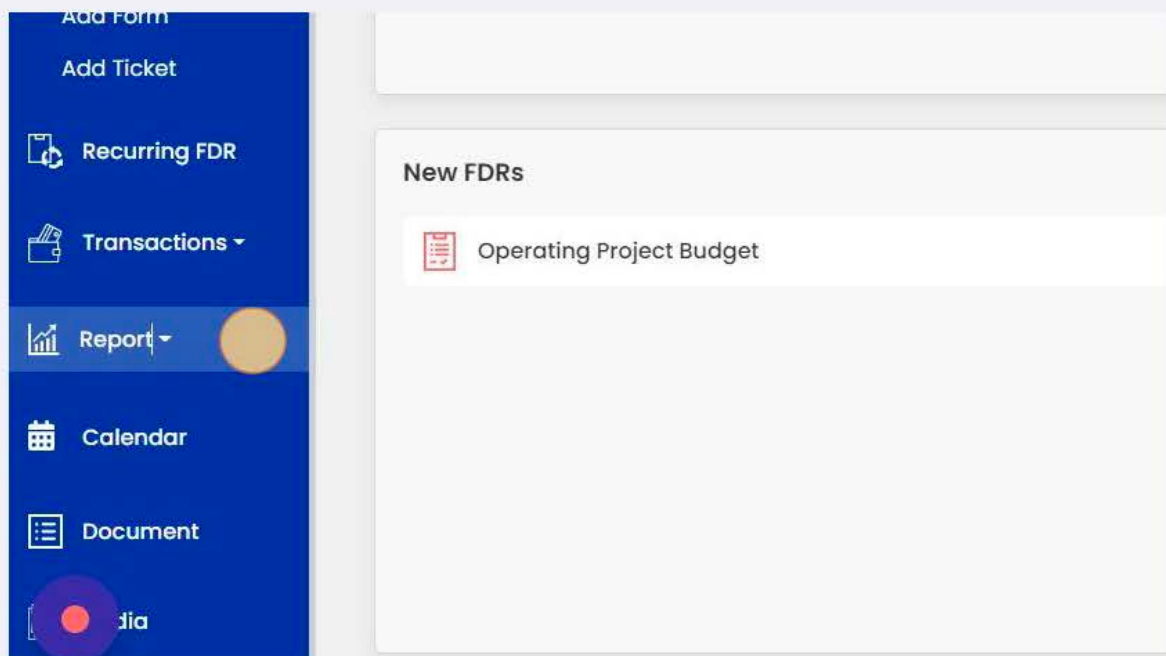
5 You are in your project Dashboard. Below, we have highlighted the most commonly used features which are explained in greater detail in the next few pages.



6 Click "Tickets"



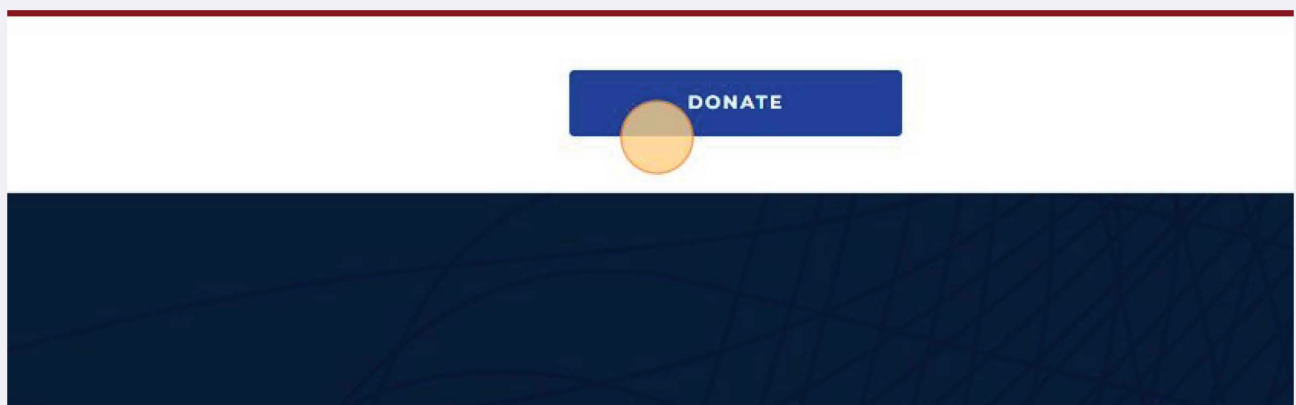
7 Click "Report"



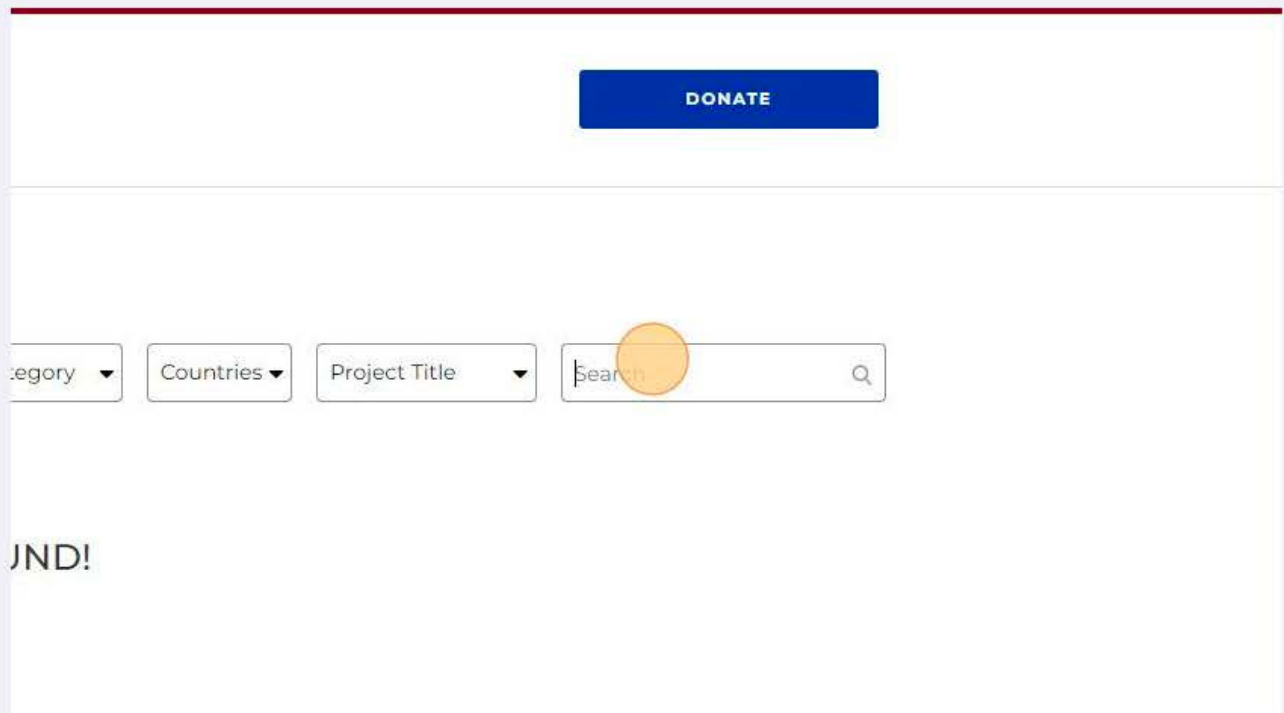
## YOUR FUNDRAISING PAGE

1 Navigate to <https://newhorizonsfoundation.com/>

2 Click "DONATE"



3 Click the "Search" field.





4 Type in the name of your project

5 Select your project by click on it's square summary page.

by Darius and Sarah Kotea

Project

Our purpose is to help those in need. This project will help the homeless, people in our community who are struggling to make ends meet, and other organizations that are helping those in need. We exist to show the love of Jesus in a tangible way!

6 Click "DONATE NOW TO THIS PROJECT".

Project Funding Options

**DONATE NOW TO THIS PROJECT**

FUNDRAISE FOR THIS PROJECT

## RECEIVING DONATIONS

# HOW TO GIVE TO YOUR PROJECT

To receive donations, you'll want to direct all donors to your project's fundraising page. For instructions on editing and accessing your fundraising page, please turn to page 13.

To embed the link to your fundraising page into your preexisting website, simply copy the code at the bottom of your fundraising page and insert into your website's internal structure.

<http://newhorizonsfoundation.com/project>

EMBED

Please mail all checks to:



The New Horizons Foundation, Inc.  
5550 Tech Center Dr. Suite 303  
Colorado Springs, CO 80919

The project name that the donation is intended for should be included in the memo line of the check. It is essential that donors giving by check address the check correctly. Incorrect checks may not be able to be cashed and will be returned to the donor, delaying funds. All checks are to be made payable to The New Horizons Foundation, Inc.

**\*\*Note:** See image below for example format.

**If checks are made out to your project instead, we will have to return it.**

Donor First and Last Name	1177
Donor Address	
Donor City, State ZIP	
DATE	01/15/2023
PAY TO THE ORDER OF	New Horizons Foundation
	\$ 150.00
One hundred and fifty	DOLLARS
MEMO	Your Project Name Here
	Signature
1: 18005907850:16035362900#11??	

## YOUR DONORS

# BENEFITS AND SUPPORT

There are many benefits of giving through New Horizons! All donors have access to our Donor Support team that can support your donor in all aspects of their giving. In addition to this support, all donors receive the additional benefits listed below:



Tax receipt per the donation



Tax summary at the end of the year



Easy online portal to view and organize their donation history

If you have any questions relating to donor support, please contact our Donor Support Team directly, using the information below.



### OUR EMAIL

[donorsupport@newhorizonsfoundation.net](mailto:donorsupport@newhorizonsfoundation.net)



### OUR OFFICE

719 260 1213 - Option 1



### OUR HOURS (MST)

Mon-Fri: 8:30AM - 4:30PM

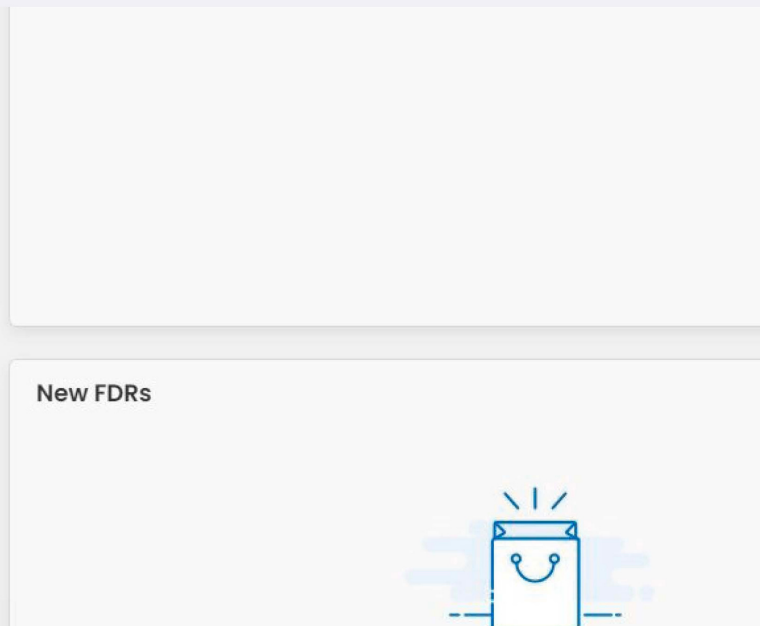
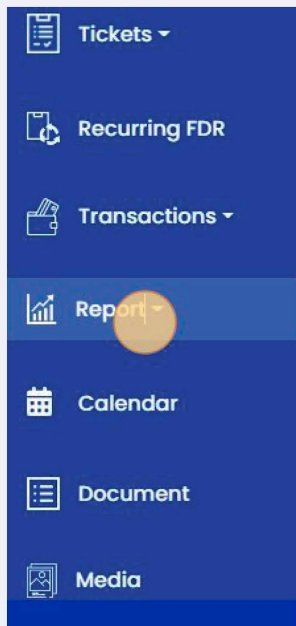
Sat & Sun: CLOSED



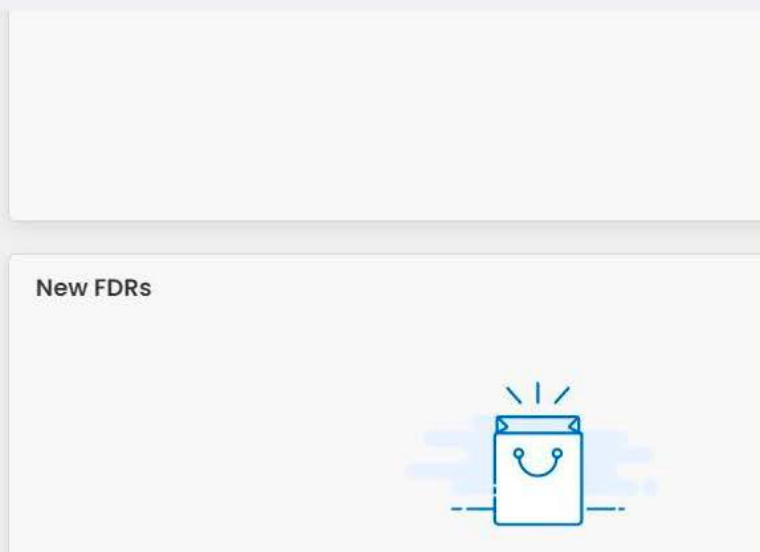
## DONATION REPORT

1 Log into your project manager portal.

2 Click "Report"

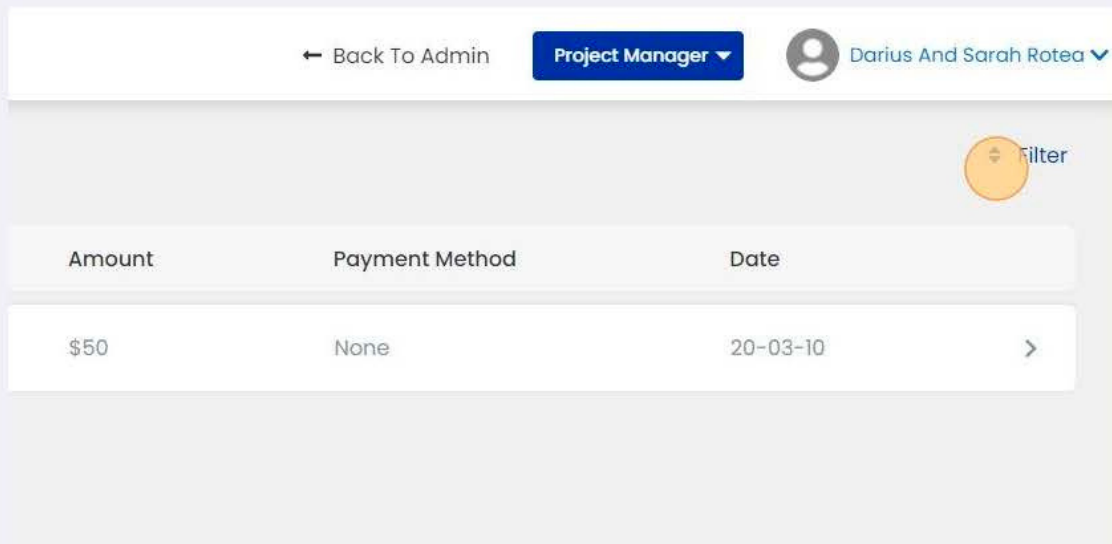



3 Click "Donation"




4

You will now be able to view all donations made to your project. To find specific information or donations, select the "Filter" button and enter your search criteria.



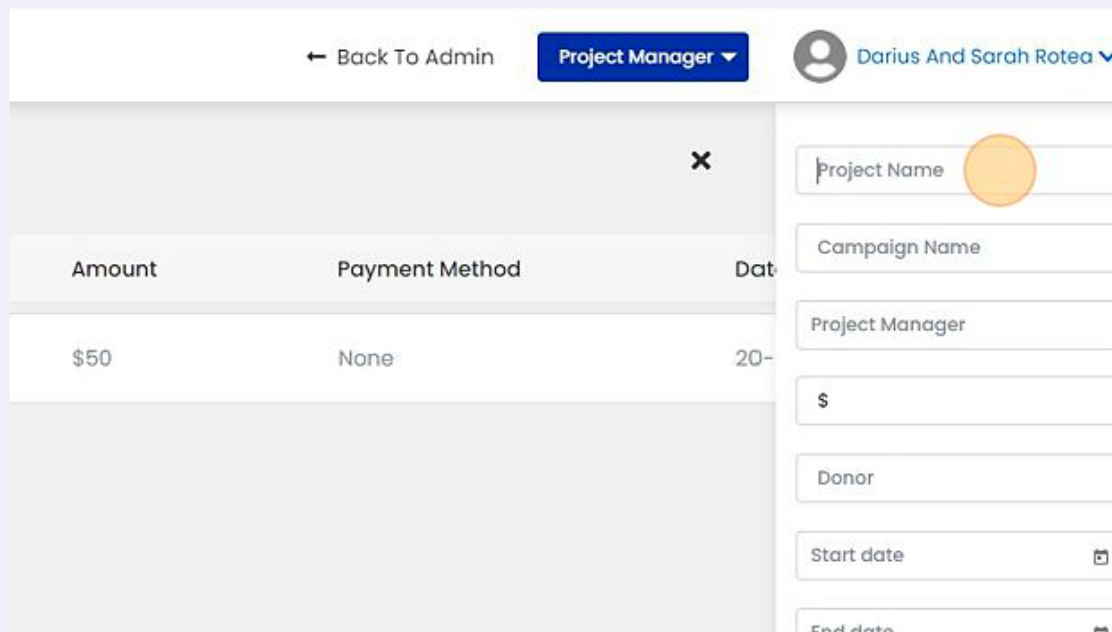
← Back To Admin   **Project Manager** ▼    Darius And Sarah Rotea ▼


 Filter


Amount	Payment Method	Date
\$50	None	20-03-10 >

5

You can search by donor, date, amount, or project. There is also an option to filter by a range of dates and payment methods.



← Back To Admin   **Project Manager** ▼    Darius And Sarah Rotea ▼

 X

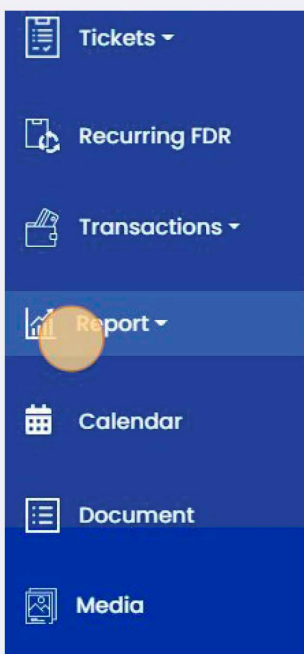
Amount	Payment Method	Date
\$50	None	20-



## RECURRING DONATIONS AND DONORS

1 Log into your project portal.

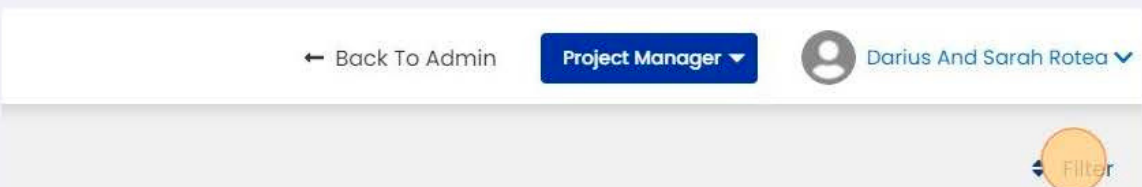
2 Click "Report"



3 Click "Recurring Donors"



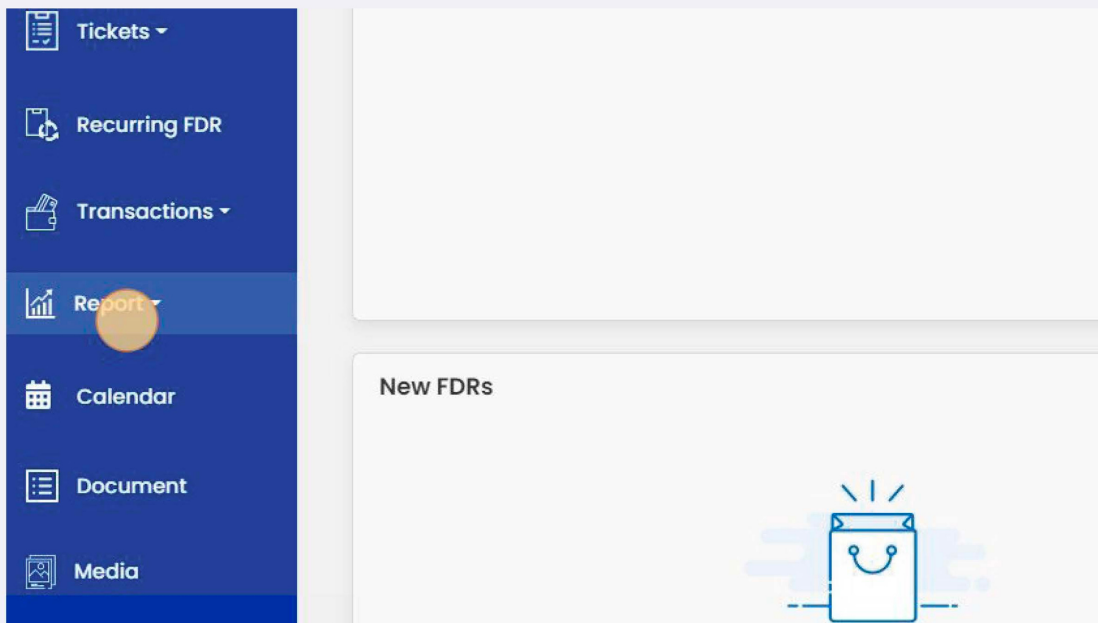
4 Click "Filter" and filter by name.



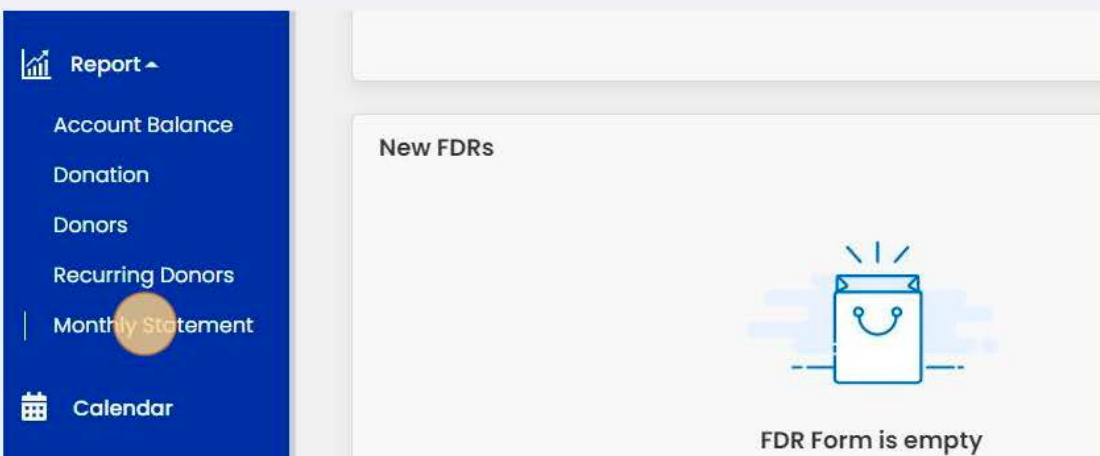
## MONTHLY STATEMENTS

1 Log into your project portal.

2 Click "Report"



3 Click "Monthly Statement"





- 4 Select your project from the drop down menu and then click the search icon.

Monthly Statement

Project Name

Love in Action

Search

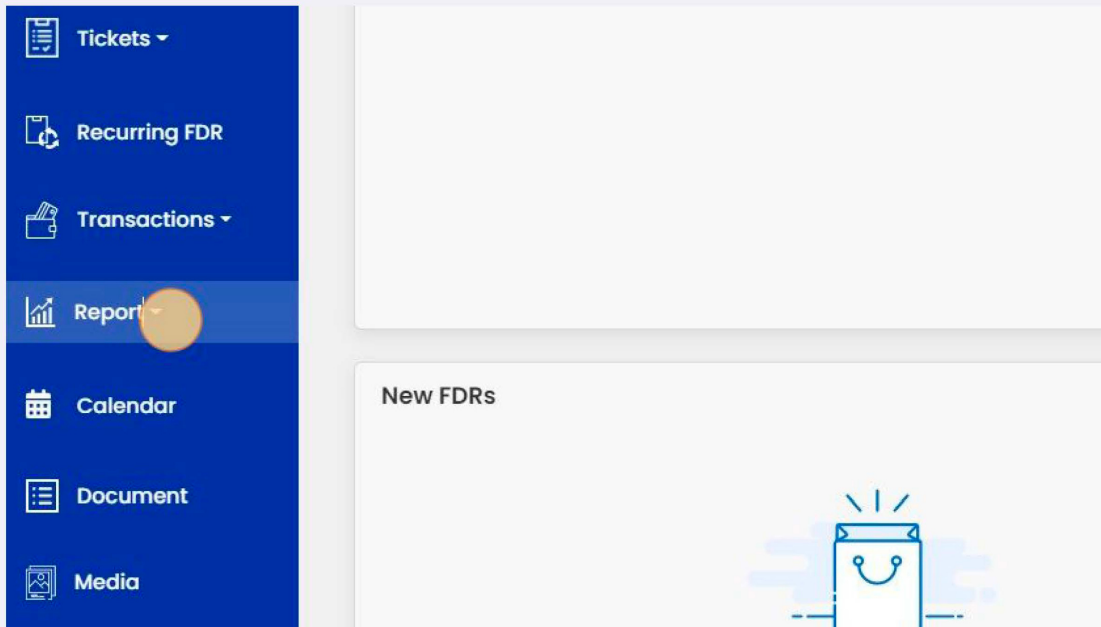
Refresh

- 5 You are now able to view your monthly statement!

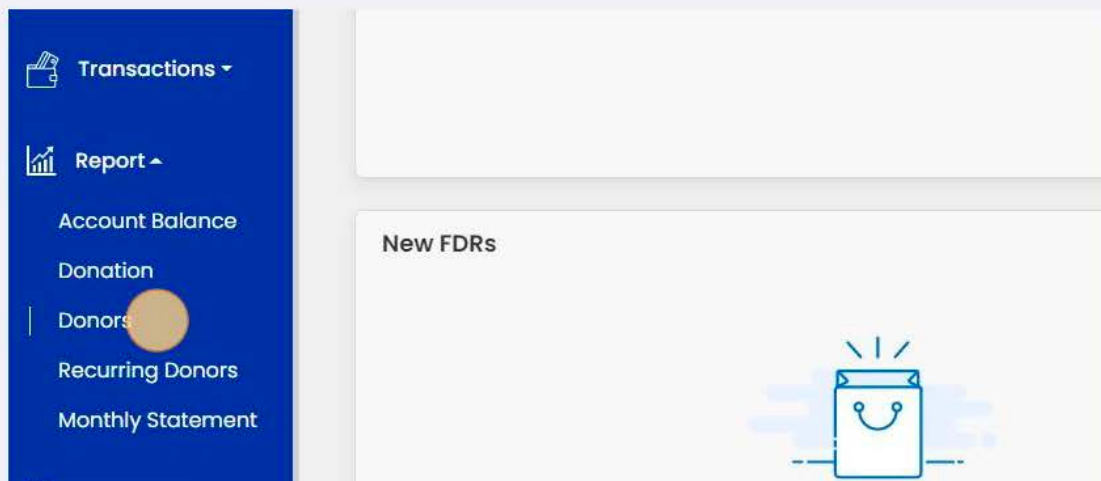
## PROJECT DONOR LISTS AND INFORMATION REPORTING

1 Log into your project portal.

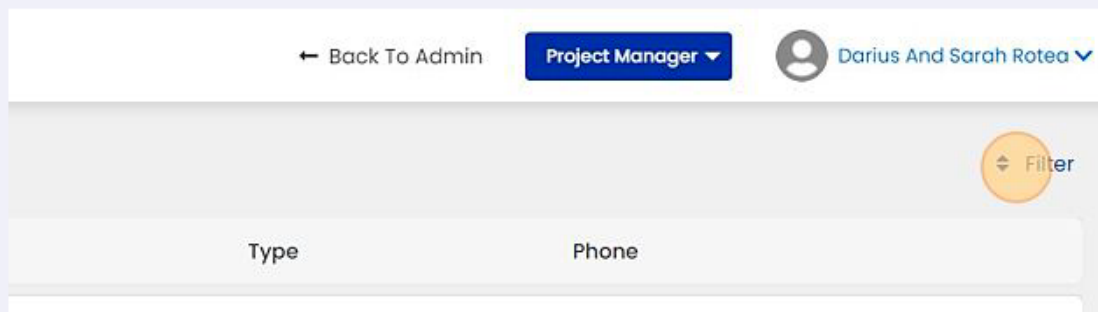
2 Click "Report"



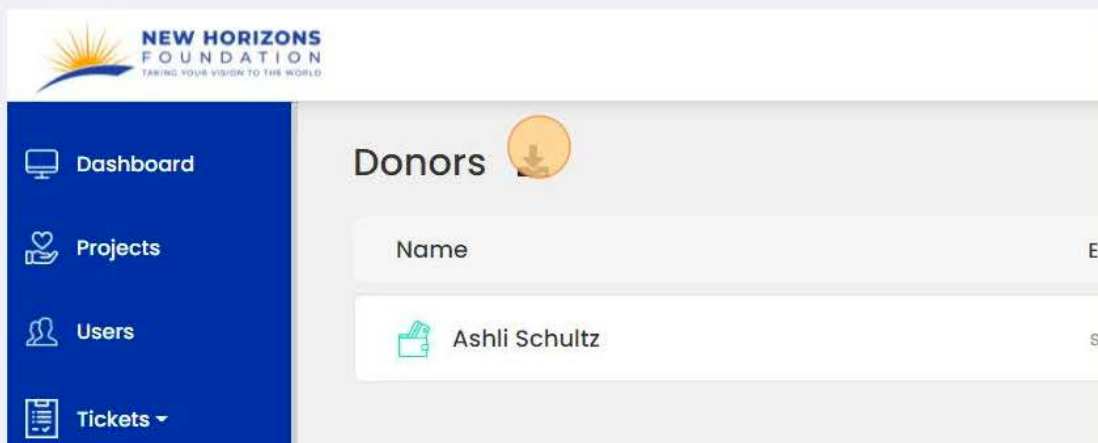
3 Click "Donors"



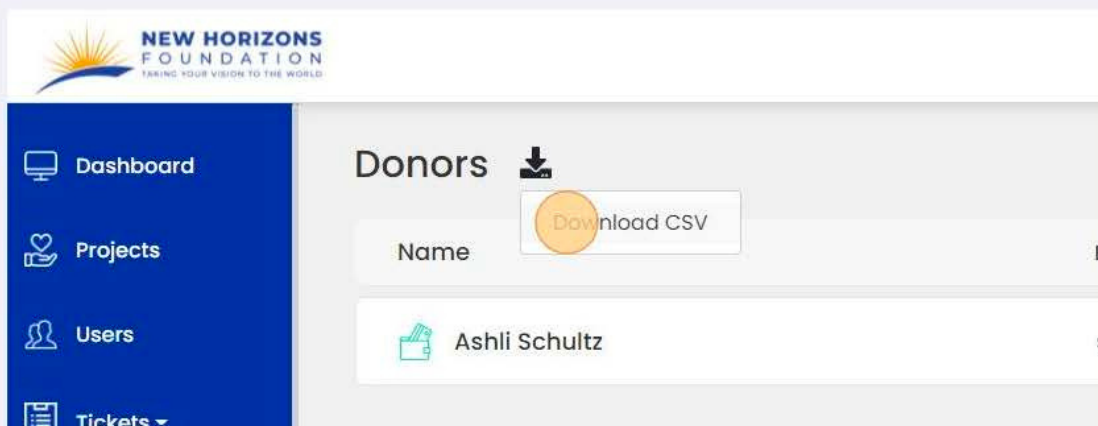
- 4 You can now view a list of your donors. Select the "Filter" option to search by name.



- 5 You can also download this report by selecting the download icon next to "Donors".



- 6 Click "Download CSV"



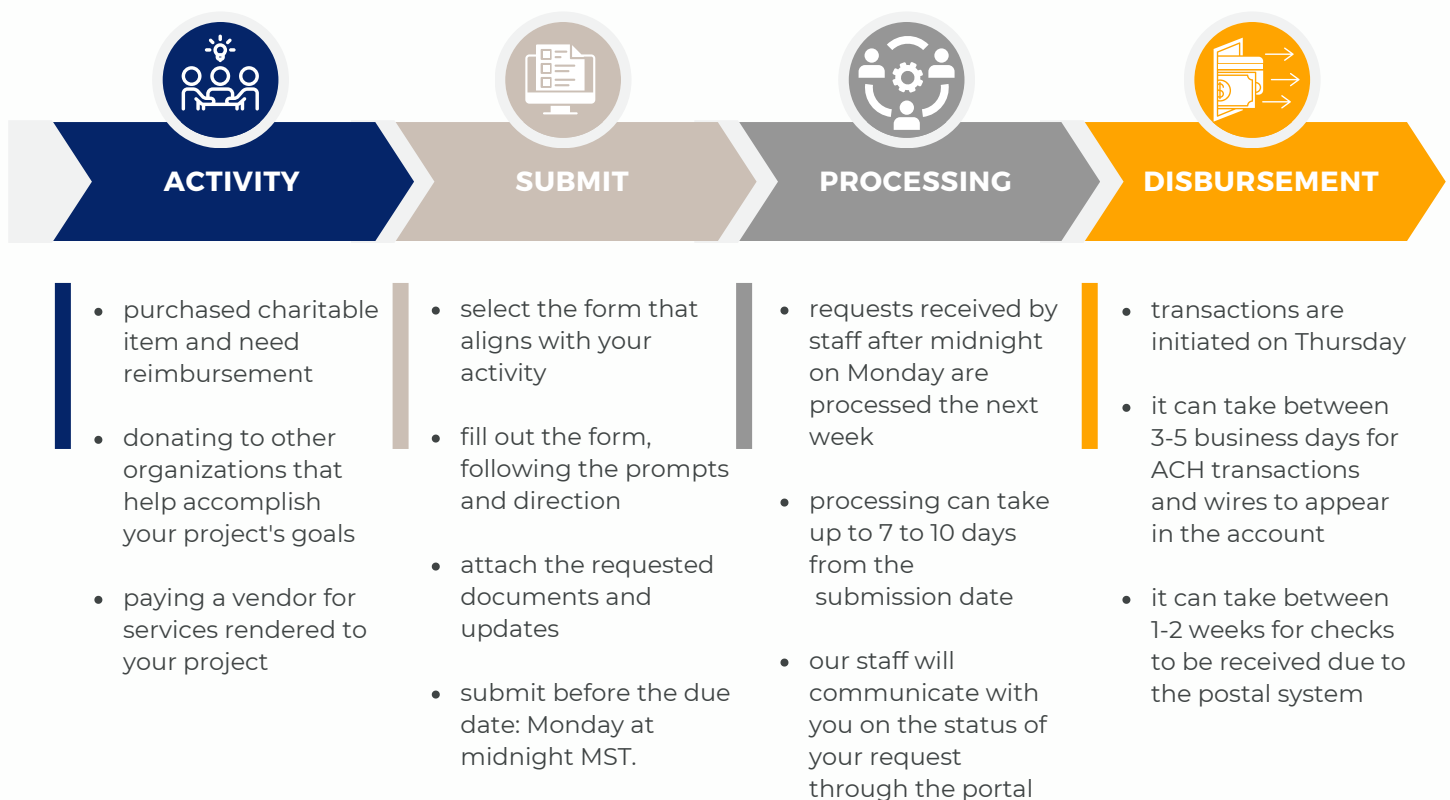


## OUR DISTRIBUTION

# PROCESSING TIMELINE

## HOW IT WORKS AND WHAT TO EXPECT

The first step to disbursing funds from your account is submitting a Foundation Distribution Request form. We have a variety of forms that align with common project activities. All you need to do is select the form that most closely aligns with your intention for the funds, follow the prompts and attach the requested documents, and submit. If you aren't sure how to fill out the form correctly, don't worry, our staff have tutorials for every step.



### ⓘ Minimum Transaction Amounts

#### Wire Transaction Minimum: \$100

\*NHF shares the wiring fees with the receiving bank. While the Foundation does not fee wires sent, the receiving banks may.

#### ACH (Bank Transfer) Minimum: \$100

#### No Minimum Check Requirement

## OUR DONATION

# PROCESSING TIMELINE

Please note, donation processing times are based on automatic system processes.



### CC DONATIONS

3 to 5 business days to post  
to project account



### ACH DONATIONS

7 to 10 business days to post  
to project account

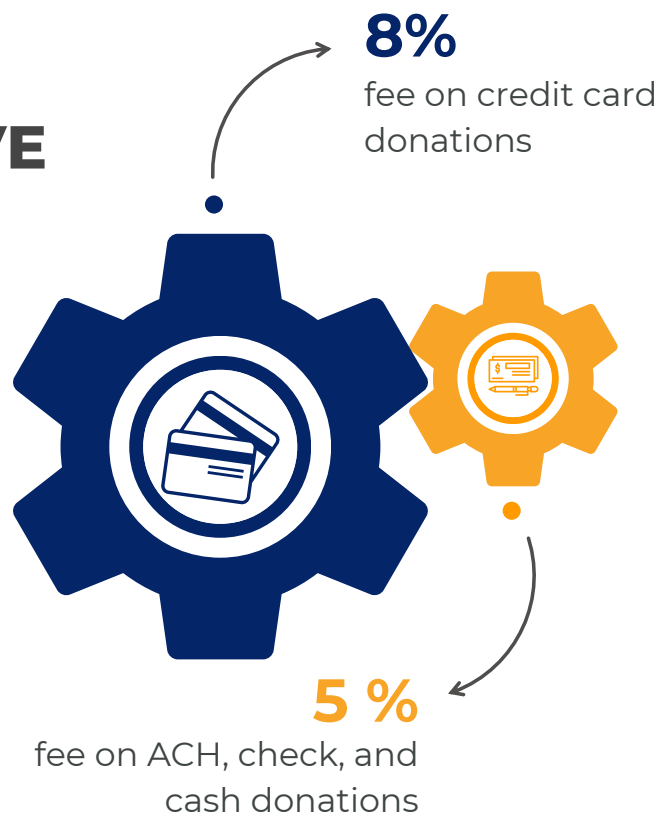


### CHECK DONATIONS

3 to 5 business days to post  
to project account

## ADMINISTRATIVE EXPENSES

We have one of the most efficient systems in the industry. That is why we can offer such a low expense structure!



## OUR ABBREVIATIONS

# AND WHAT THEY MEAN

## Common Terms

### 501(c)(3)

A tax category for nonprofit organizations, such as charitable organizations, churches or religious organizations, and private foundations. 501(c)(3)'s are exempt from federal income tax.

### Operating Project

Projects that have been NHF approved and are proposed to carry out a specific charitable purpose that fits within the Foundation's charitable objectives and activities of existing projects.

### Project Manager

Volunteers referred to the foundation by board members, staff, project managers, and donors of NHF. Project managers raise funds, provide overview and guidance for projects, and operate their projects.

### Fiscal sponsor

A common mechanism used in the nonprofit sector that enables individuals, groups, 501(c)(3)s, or foreign NGOs to start new programs without establishing a new, separate nonprofit, tax-exempt organization. Projects obtain their charitable status from their fiscal sponsor.

### FDR

Stands for Foundation Distribution Request, and refers to the forms used to request funds from your project account. FDR's are tailored to a variety of situations and project activity.

### Personal Inurement

The IRS dictates that 501(c)(3) organizations must not be organized or operated for the benefit of private interests, such as the creator or the creator's family, shareholders of the organization, other designated individuals, or persons controlled directly by such private interests.

Essentially, nonprofit organizations may not use their income or assets to directly benefit an individual. As a project manager, this means that any expenses that directly benefit you or a member of your ministry are not eligible for reimbursement.



## FREQUENTLY ASKED QUESTIONS

**Q** If New Horizons is my fiscal sponsor, do I have to pay sales tax or am I exempt? Can I claim 501(c)(3) status?

**A** New Horizon's tax-exempt status extends only to the Foundation and its administration and operation. As such, you are not exempt from tax unless you have your own 501(c)(3) entity registered with the IRS.

**Q** How do I know which expenses are charitable and which are not?

**A** In general, a charitable expense is any expense that directly relates to the operation of your project and is not considered a "personal" expense. Personal expenses would be any costs that would be incurred in daily life, regardless of ministry, like groceries, health insurance, or technology. Additionally, personal expenses could also be any expenses that personally benefit you. This would be defined as personal Inurement which is defined above. Charitable expenses are unique to each project as each is unique in its function and purpose. However, some examples include travel costs, office supplies, 50% of phone and internet used for ministry. If you are not sure if an expense is charitable or not, please give us a call or send us an email and we would be happy to discuss it with you.

**Q** Do I qualify for Ministers Housing Allowance if I do ministry full-time?

**A** To qualify for Ministers Housing Allowance, you must be an ordained minister and have a letter of assignment from an established church.

**Q** Why are so many different compliance documents needed?

**A** As part of our compliance requirements with the IRS, we need to be able to explain and justify each exchange of funds. Different compliance documents accompany different types of transactions and generally include both a signed agreement and an entity/individual verification. The good news is that once we have the compliance documents on file for the recipient, you will not need to resubmit them with each disbursement!

## OUR RECOMMENDED

# RESOURCES AND TOOLS

### EXPENSIFY

EXPENSIFY IS AN APP THAT ORGANIZES YOUR CHARITABLE EXPENSE RECEIPTS. YOU CAN ALSO BE REIMBURSED FOR THE PRICE OF THE APP!



### FX-RATE

THE CURRENCY CALCULATOR WITH FX-RATE.NET IS A GREAT TOOL TO CONVERT FOREIGN EXPENSES FOR REIMBURSEMENT.



### ADOBE PRO

WE RECOMMEND AN ADOBE PRO SUBSCRIPTION AS THE MAJORITY OF THE FORMS YOU WILL RECEIVE FROM US WILL BE IN PDF FORM.



### BEST BUY'S GEEK SQUAD

BEST BUY OFFERS TECHNICAL SUPPORT WITH THEIR GEEK SQUAD. THEY OFFER A VARIETY OF SUPPORT, INCLUDING IN STORE, ONLINE, AS WELL AS A SUBSCRIPTION BASED SERVICE FOR IN HOME CONSULTATIONS AND SUPPORT. YOU CAN VIEW THE EXHAUSTIVE LIST OF THEIR SERVICES ON THE BEST BUY WEBSITE.





# *NEED MORE HELP?* **CONTACT US**



**Please call us at:**  
New Horizons Foundation: (719) 260-1213  
or toll free at 1 (800) 531-4075

Joy to the World: (719) 260-1173  
Donor Support: Option 1  
Operations Department: Option 2



**Please direct any mail to:**  
The New Horizons Foundation, Inc.  
5550 Tech Center Dr. Suite 303  
Colorado Springs, CO 80919



**Please email us at:**  
[info@newhorizonsfoundation.com](mailto:info@newhorizonsfoundation.com)