

Support Webinar: Processing Recommendations for GOfund

Agenda

- GOfund Overview
- Set-Up and Admin
- GOfund User Interface Demo
- Processing GOfund Grant Recommendations in akoyaGO
 - To an organization (Request)
 - To an established fund (Interfund)
 - Recurring (Scheduled Distribution)

GOfund Overview

WHAT is GOfund

External portal for donors/fundholders

Integrates with akoyaGO

WHO can access?

Fundholders and donors

Designated by foundation

HOW do they access?

Visit a foundation-specific URL (provided in email)

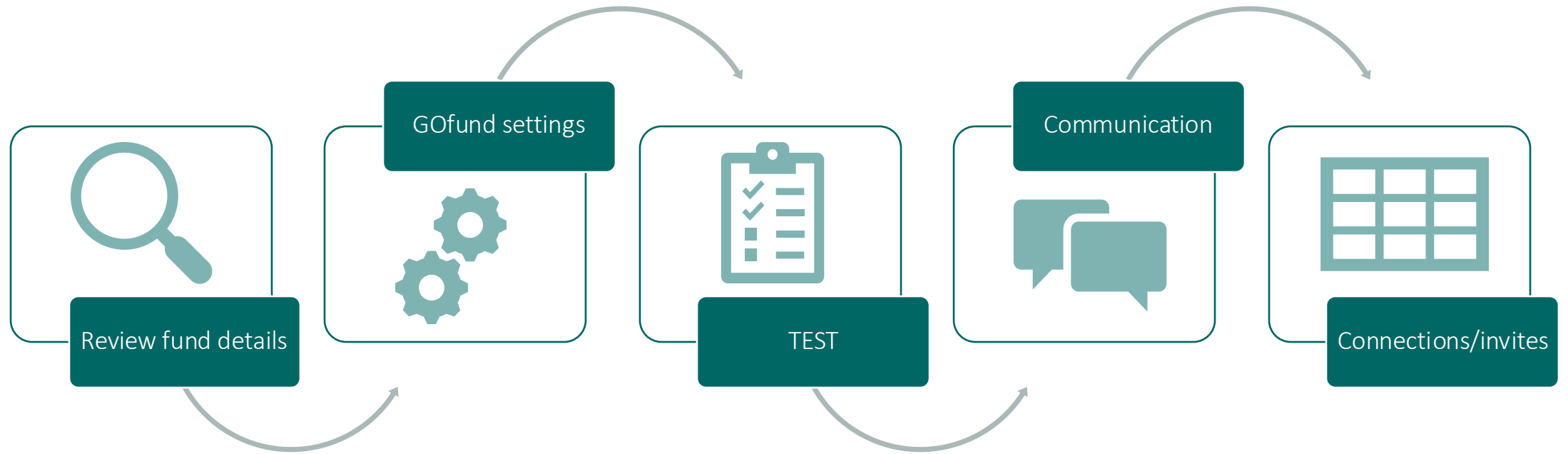
Set password/login

WHY is this beneficial?

Real-time data

View fund statements anytime

Set-Up Before Launching GOfund



Fund Connections

Make connections from the Fund record in akoyaGO

Assign the Role: Donor Portal Access

Connect a Contact that has a valid email address

Set Permissions at the connection level

Additional Resource: [Adding Fund Connections](#)

Recommend a Grant: What will be created?

Grant to an Organization

- Pending Request
- Pending GOfund Requests System View (Requests)

Grant to Established Fund

- Interfund
- GOfund Pending Requests System View (Interfunds)

Grant on a Standing/Recurring Basis

- Request and Scheduled Distributions
- Active Scheduled Distributions System View

Additional Resource: GOfund Admin Guide, GOfund Custom Recommend a Grant Form

Recommend a Grant to an Organization

Existing Organization in akoyaGO

List comes from System View (Constituents) - GOfund Grant Recommendation Eligible Constituents

Create New Organization

Adds a brand-new constituent record

Charity Search

When enabled, users can search IRS or CRA-registered orgs

If the org isn't already in your database, a new constituent record will be created

Additional Resource: [Updating List of Eligible Funds for GOfund Interfund Funds](#)

What is created in akoyaGO?

PENDING Request –
Awaiting action
from the foundation



System View –
Pending GOfund
Requests

Fields Populated on Request

Summary

Project

Documents

Process Tab – Recommendation Info

Recommended Grant

Applicant

Purpose

PDF

Grant Recommender

Fund

Anonymous

Recommended Payment Date

Anonymity will be marked Yes on the Payment when the Request is Approved

Maps to Estimated Grant Pay Date on the Payment when the Request is Approved

Recommend a Grant to an Established Fund



If a fund holder opts to recommend a grant to an Established Fund rather than an external organization, an Interfund request will be created.



The list of available funds comes from the GOfund Interfund Funds system view

What is created in akoyaGO?

Interfund record created



Waiting to be processed (waiting for action from foundation)

Where do I look?



System View – GOfund Pending Requests (Interfunds)

Fields Populated on Interfund

- Amount
- Interfund Grant Date
- Grant Recommender
- Grant Purpose
- Gift Purpose

This information ends up on the related records (Request, Payment, Gift, Gift Payment) when I process the Interfund

Recommend a Grant on a Recurring Basis

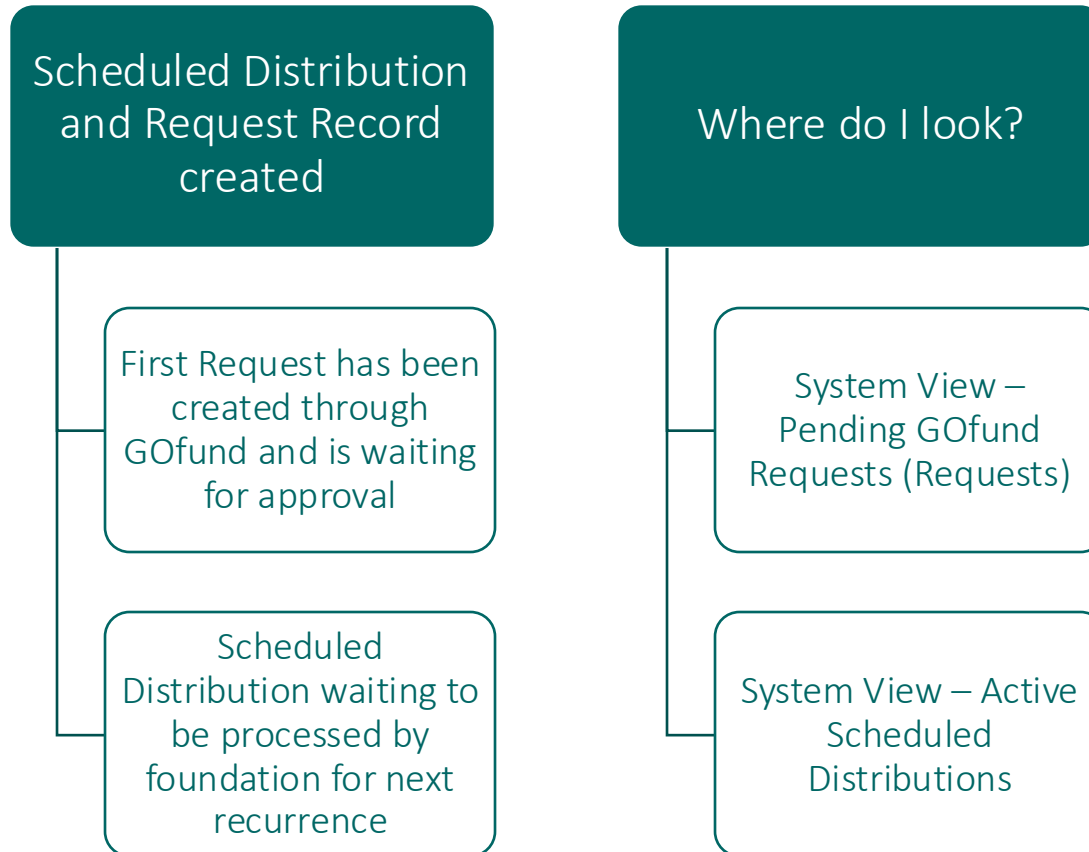


Can choose to enable or disable this feature in GOfund Settings



Feature currently only available for recurring grants to organizations, not recurring interfunds

What is created in akoyaGO?



Fields Populated on Interfund

- Title
- Grant Recommender
- Grantee, Primary Contact, Payee
- Amount
- Start and End Date
- Frequency
- Scheduled Distribution Source

This information ends up on the related Request when I process the Scheduled Distribution

Donate through GOfund

GOfund Settings:
'Enable Donations'

GOfund User can:

Give to my funds

Choose "Give to
Another fund" and
redirects to GOfund
(logged in as a user)

The screenshot shows the GOfund Settings page for a user named '1000 - Saved'. The page has a navigation menu with options: General, Theme, Home Page, Fund Summary, Fund Statement, Recommend Grant Form, Grant History, Gift History, FAQ Page, Donations (highlighted with a red box), Profile, Charts, Internal, and Related. A 'Form assist' button is visible in the top right. The 'General Settings' section is expanded, showing the following options:

Setting	Value
Enable Donations	Yes (toggle is on)
Enable Designated Giving	---
Enable Recurring Donations	---
Link to GOfund	Yes (toggle is on)
Customization for Donate label	---
Customization for GOfund Link Label	---

Donate through GOfund

Empowered Fund Summary Fund Statement Funding Opportunities Recommend a Grant ▾ Grant History Gift History Data Visualization Documents FAQ **Give to another fund**



Home Fund Catalog Contact Us

Donate Now ▾

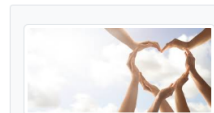
☰ Claire McFund ▾

Fund Catalog

-- filter by interest -- ▾

Search by name

🔍 Search



Acome Family Fund

Dedicated to protecting and restoring natural habitats, this fund supports...

[Learn More](#)



Becker Family Fund

[Learn More](#)



The Burger Family Charitable Fund for the Florida Panther

This scholarship celebrates students who study the Florida panther or...

[Learn More](#)



Harrison Family Hope and Empowerment Fund

[Learn More](#)



Jackson Lee Urban Renewal Fund



Jen Tenn Environmental Fund

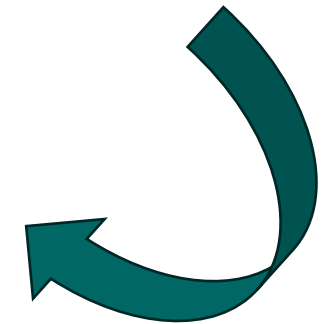


Jennifer Robbins Urban Renewal Fund

Affordable housing and community



The Johnson Family Charitable Fund



Where Can I Find Additional Related Resources?

[GOfund Admin Guide](#)

[Updating List of Eligible Funds for GOfund Interfund Funds](#)

[Adding Fund Connections](#)

[GOfund Custom Recommend a Grant Form](#)

[GOfund Charts and Custom Grang Recommendations Webinar](#)

[GOfund Implementation – Suggested Learning Course](#)



Next Steps

Interested in beginning the GOfund Process or resuming the process?

Reach out to your AM

Future GOfund Questions?

Create Support case in GOSupport

Any Questions?

Thank you!

akoyago