

# EMPOWERED

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## Gofund FOR PRIVATE FOUNDATIONS

PRESENTED BY

Meghan Davignon | Director, Product

Addie Kelzer | Manager, Client Experience

Christopher Bernal | Virginia G. Piper Charitable Trust, Grant Operations

akoyago

# OBJECTIVES

1. Use case: How a Private Foundation can leverage GOfund for designated giving.
2. GOfund capabilities tailored for DIG, TIG.
3. Configuration options and best practices for setup.

# KEY CHALLENGES FOR PRIVATE FOUNDATIONS

- Inconsistencies in Receiving Recommendations
  - Unestablished point of entry
  - Information provided/collected varied
- Inefficiencies with Processing Recommendations
  - Manual request/record creation
  - Manual confirmations/acknowledgements to recommender

# KEY CHALLENGES FOR PRIVATE FOUNDATIONS

- Internal/External Allocation Tracking Lacked
  - Clarity on available funds
  - Visibility on previous recommendations
  - Awareness of payment status
  - Autonomy/efficiency for recommenders

# ADD VALUE FOR STAKEHOLDERS

- Stakeholders can:
  - Recommend grant disbursements
  - Track their available balance to spend
  - View granting history

Grants recommended through GOfund create Request records in akoyaGO.

# CORE CONFIGURATIONS FOR GOFUND

- Review parts of setup with the [GOfund Testing Checklist](#)
  - Permissions
    - GOfund (no accounting) security role is needed
  - Set up Funds
  - Connections and Activities

**Important:** A GOfund User can only access the portal if they receive an invitation (connection) from foundation staff.

# CONNECTIONS

- The "Donor Portal Access (GOfund)" role is the only connection that grants access to GOfund
- Add Connections individually or in bulk
- Use an akoyaGO supplied template for bulk connections
- GOfund > Impersonate feature available from a Connection record

## Best Practice

Emails are sent as soon as a connection is established. Thoroughly test prior to initiating connections, or schedule the start date for after testing is finished.

# CONFIGURATION OPTIONS

- Review parts of setup with the [GOfund Testing Checklist](#)
  - Views / GOfund Usage Metrics Dashboard
  - GOfund Logs
  - GOfund Email Templates
  - GOfund Settings
  - Documents
  - Recommend a Grant options
  - Testing and UI

## Best Practice

Test all actions that donors make take.



# UPCOMING

- Fully customizable Grant Recommendation Form
  - If additional options are needed outside of GOfund Settings for the Recommend a Grant Form, a custom form can be built through form builder.

## Best Practice

GOapply applications are also build in form builder. Knowledge share with internal partners in Grants Management who have built forms in form builder.

# KEY TAKEAWAYS

- Staff have access to Funds and GOfund settings with role: GOfund (no accounting).
- Connections must be made to access GOfund; it is not a public site.
- GOfund Connections can be made in bulk by akoyaGO (>50), request an import template.
- Test everything in the UI, review how information is coming into akoyaGO, and train staff on when these records merge with existing processes.
- Send proactive communications to those who will get connection emails to reduce any concerns about spam.

# THANK YOU

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Meghan Davignon  
Addie Kelzer  
Christopher Bernal