

# Your guide to GOfund

Napa  
Valley  
Community  
FOUNDATION

## Welcome to GOfund!

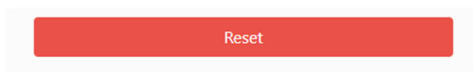
As a fundholder of Napa Valley Community Foundation, you can access your fund's grants and contribution history, and view your fund statement on our donor portal, GOfund. Our donor portal makes it simple to manage your fund and its available 24/7 from anywhere, on any device.

## Establishing your GOfund account

GOfund users will receive an email invitation, initiated by the Foundation, that contains a link which directs you to the GOfund portal for account creation. The sender address is [lupe@napavalleycf.org](mailto:lupe@napavalleycf.org). Below is an example of the standard message. *Note: if the email cannot be found in your inbox or spam/junk folder, please contact [grantsadmin@napavalleycf.org](mailto:grantsadmin@napavalleycf.org) for assistance.*



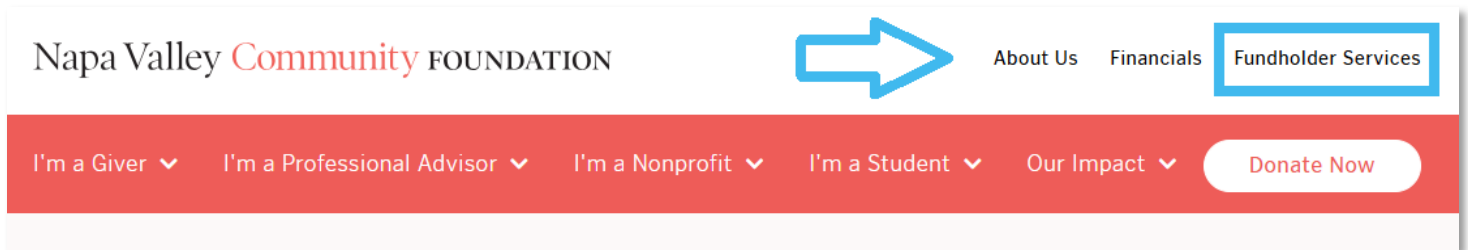
Follow the email instructions and visit the included link to create your new password. You will be directed to enter your email address (this will be your username) and a password of your choice. You will need to confirm the password by retyping it. **Select Reset when complete.**



A confirmation screen will appear when complete. Additionally, a link will be available to return you to the main login page.

## Returning to your GOfund account

Visit Napa Valley Community Foundation’s website ([napavalleycf.org](https://napavalleycf.org)) and click on **Fundholder Services** at the top of the page.



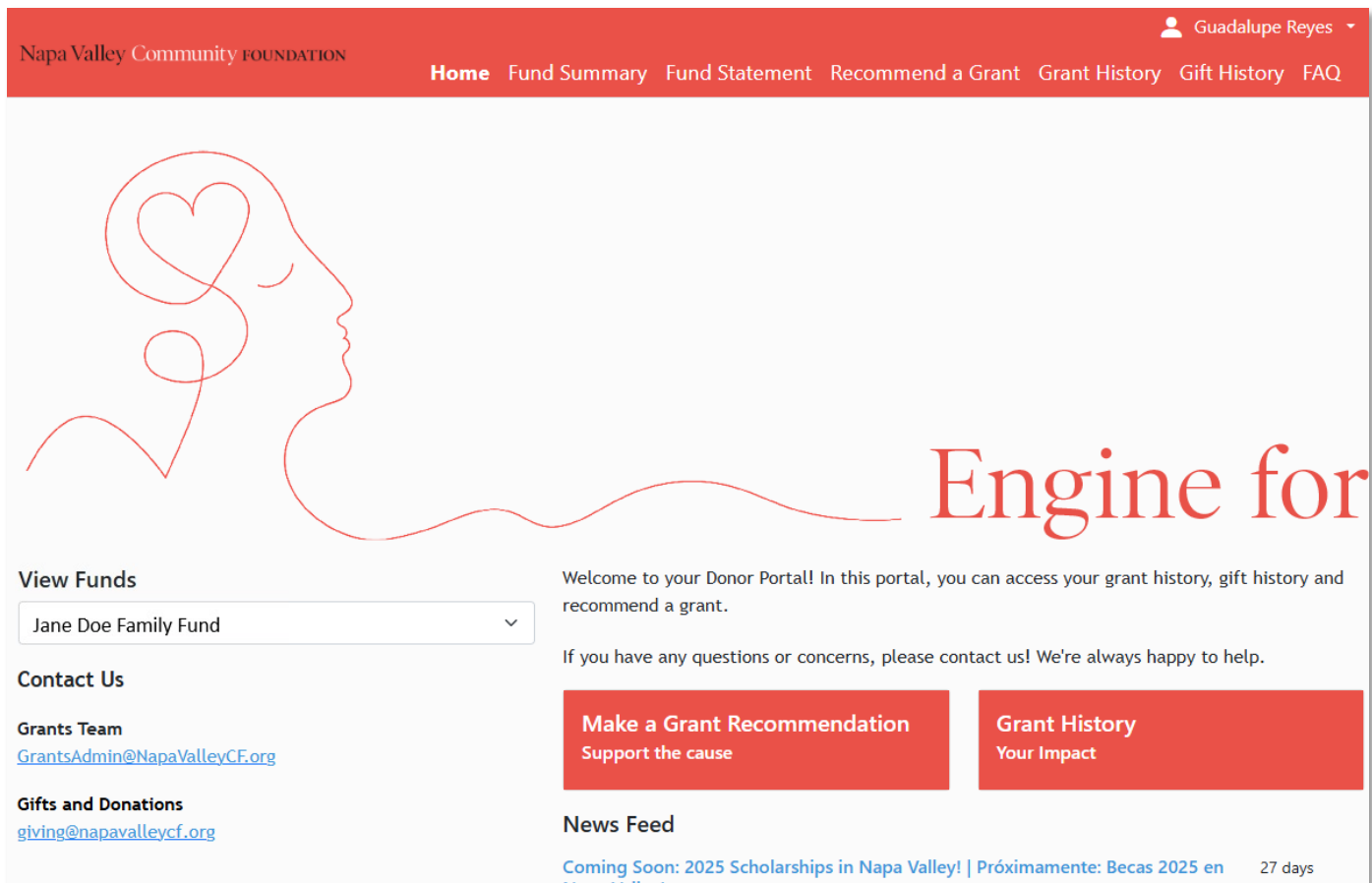
You can also navigate to GOfund directly by using the following web address:

<https://gofund.akoyago.com/NAPAVALLEYCF>

## Signing In

On the main login page, enter your email address and your password and select **Sign In** to login.

Upon logging in, your home page will appear. On this page, you have quick access to fund management tools and to our latest news feed. *Note: if you manage multiple funds, you can toggle between your funds by clicking into the drop-down list under “View Funds”.*



## Fund Management Features

The menu tabs at the top of the page display different features available to you as a fundholder. *Note: the tabs available to you may be different depending on your fund type or your fund access permissions.*

### Fund Summary

Provides you with a snapshot of your fund’s activity, including current fund balance, recent contributions received into your fund, recent grant payments from your fund, and pending grant recommendation/submissions.

### Fund Statement

This tab shows a year-to-date fund statement for you to download as a PDF file. You can adjust the date filters to view activity prior to the current calendar year.

### Recommend a Grant

This tab allows you to make grant recommendations from your fund.

### Grant History

This tab shows the history of grants awarded from your fund including type of grant, organization name, amount, grant purpose, date issued, and the ability to repeat a previous grant recommendation. You may click the “Export to Excel” to export information about each grant payment (with additional information) into a Microsoft Excel spreadsheet.

### Gift History

This tab shows the history of contributions received into your fund. You may click the “Export to Excel” to export information about each contribution into a Microsoft Excel spreadsheet.

### FAQ

This tab provides you with support and responses to the most frequently asked questions about processing grants from a Donor Advised Fund.

## Reviewing your Grant or Gift History

By default, these pages will display grant or gift entries during the current calendar year. To view grant or gift entries from previous years, please adjust the **Start Date** and **End Date** and click **Apply Filter**. Choose the **Export to Excel** option to generate a shareable Microsoft Excel spreadsheet. *Note: if you manage multiple funds, you can see history for more than one fund at a time by clicking into the drop-down list under “Fund Name”.*

The screenshot shows a date filter interface. At the top, there are two input fields: "Start Date" with the value "12/01/2023" and "End Date" with the value "12/19/2024". Below the Start Date field is a calendar for December 2023. The calendar shows the days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and the dates (26, 27, 28, 29, 30, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31). The date "1" is highlighted in blue. Below the calendar are two buttons: "Reset" and "Apply Filter".

Additionally, when in Grant History, you can select to repeat a grant from your history by clicking **Repeat Grant** on the far-right hand column.

Grant History <a href="#">Export to Excel</a>									
Request Type	Request Applicant	Net Amount	Title	Est. Grant Pay Date	Payment Status	Request #	Formal Fund Name		
Grant	American Canyon Community and Parks Foundation (ACCPF)	\$5,000.00	for general/operating support	12/11/2024	Paid	010101	Jane Doe Family Fund	<a href="#">Repeat Grant</a>	
Grant	Girls on the Run Napa & Solano, Inc.	\$5,000.00	for general/operating support	12/11/2024	Paid	010100	Jane Doe Family Fund	<a href="#">Repeat Grant</a>	
Grant	Nimbus Arts	\$10,000.00	for general/operating support	12/11/2024	Paid	010099	Jane Doe Family Fund	<a href="#">Repeat Grant</a>	
Grant	UpValley Family Centers of Napa County	\$10,000.00	for the UpValley Family Centers' 25th Anniversary Challenge, a challenge initiated by Redwood Credit Union	11/20/2024	Paid	010098	Jane Doe Family Fund	<a href="#">Repeat Grant</a>	
Interfund	Community Foundation of the Napa Valley	\$1,000.00	to NVCF 30th Anniversary Fund	8/28/2024	Interfund	010097	Jane Doe Family Fund	<a href="#">Repeat Grant</a>	

## Recommending a Grant

If you are listed as an advisor for the Fund and are eligible to recommend grants, you will see the **Recommend a Grant** tab on your menu options. *Note: if you have “read-only access” for GOfund, you will not see this tab.*

### A Fund Name

If you are an advisor for multiple funds, you must select the fund name from the drop-down list under “View Funds” before you begin your grant recommendation.

### B I would like to grant to

You can recommend grants to organization(s) or request a transfer from your Donor Advised Fund to another Fund at Napa Valley Community Foundation.

### C Organization Name

Choose an organization you wish to support from a drop-down list of organizations in our database. To improve your search results, please type-in the organization’s legal name when available. *Note: if you can’t find the organization you wish to support, you can search for the organization using the Charity Search or create an organization if you are not able to find it another way.*

### D Amount

Type in the amount of your grant recommendation. The minimum grant amount is \$250.

### E Grant Type / Purpose of Grant

Select whether your grant is unrestricted or restricted. If restricted, please tell us what the grant should be designated for (e.g. capital campaign, specific program, endowment, etc.).

### F Recommendation Note

Optional field for you to provide our grants team with any additional instructions for processing your grant.

### G Do you want us to share your name contact information with this organization?

Your fund’s name will be listed by default, unless your Fund is anonymous. If you wish to additionally be recognized by name in the grant letter, please enter your name(s) and any contact information here.

### H Anonymity

If you would like your grant recommendation to be anonymous (especially for Funds that are not normally anonymous), please check off the box for “Please issue this grant anonymously”. Checking this box ensures that your fund name will not be shared in the grant letter.

### Recommend a Grant

Fund Name A

I would like to grant to B

Organization Name \* C

[Add dedication](#)

Amount \* D

Grant Type \* E

Recommendation Note F

Do you want us to share your con G

Please issue this grant anonym H

By check off this box, the authorized distribution.

The advisor of the above named Fund the following purposes:

Note: only fields marked with an asterisk(\*) are required, so it's ok if you aren't able to enter all of the requested information.

I also acknowledge that by clicking the "Submit" button below I am signing this recommendation form electronically which is equivalent to my legal handwritten signature. I understand that the NVCF Board of Directors will make final approval of this request.

You must read the Certification text above and click the check box to submit your recommendations.

Submit

Please review your grant recommendation details and read and check the certification clause before you click the **Submit** button.

You will see this confirmation message after submitting your recommendation(s):

Napa Valley Community FOUNDATION      Home Fund Fund Recommend a Grant Gift FAQ  
Summary Statement Grant History History

We are in receipt of your grant recommendation(s).

Grants meeting NVCF's due diligence requirements are generally mailed within 10-12 business days.

You may also contact [GrantsAdmin@NapaValleyCF.org](mailto:GrantsAdmin@NapaValleyCF.org) for the status of your grant recommendation(s).

For additional Fundholder Services and information, visit our website: <https://www.napavalleycf.org/fundholder-services/>

If you have any questions, please do not hesitate to contact us at [GrantsAdmin@NapaValleyCF.org](mailto:GrantsAdmin@NapaValleyCF.org).

Sincerely,  
NVCF Grants Team

Recommend another Grant

[Go back to fund summary](#)

One of our Philanthropic Engagement staff will acknowledge receipt of your grant recommendation(s) by email. Grants meeting NVCF's due diligence requirements are generally processed and mailed within 10-12 business days.

If you would like to recommend more grants, please click **Recommend another Grant**. If not, you can return to your Fund Summary to find your latest submission under Pending Recommendations/Submissions.

#### Pending Recommendations/Submissions

Request #	Applicant	Grant Recommender	Recommended Payment Date	Recommended Grant	Title
013351	10,000 Degrees	Jane Doe	1/2/2025	\$250.00	Grant to 10,000 Degrees
013354	Airdrie Food Bank	Michael Doe	1/2/2025	\$250.00	Grant to Airdrie Food Bank by Jane Doe Family Fund

## Troubleshooting

If you have any questions or you are having trouble with any of the items listed above, please contact Lupe Reyes, [grantsadmin@napavalleycf.org](mailto:grantsadmin@napavalleycf.org) or (707) 254-9565 x18 for assistance. You can also check out the **FAQ** tab for more information.