Your guide to GOfund

Napa
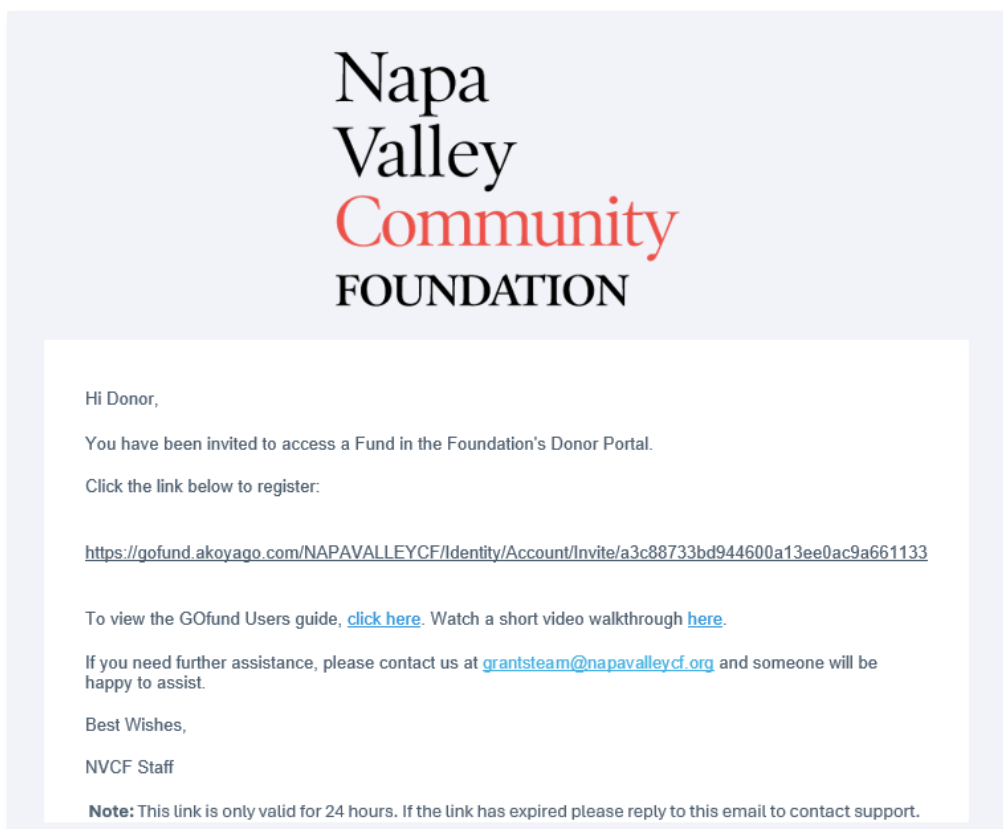Valley
Community
FOUNDATION

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. Below is an example of the standard message. *Note: if the email cannot be found in your inbox or spam/junk folder, please contact GrantsTeam@napavalleycf.org for assistance.*

Hi Donor,

You have been invited to access a Fund in the Foundation's Donor Portal.

Click the link below to register:

https://gofund.akoyago.com/NAPAVALLEYCF/Identity/Account/Invite/a3c88733bd944600a13ee0ac9a661133

To view the GOfund Users guide, click here. Watch a short video walkthrough here.

If you need further assistance, please contact us at grantsteam@napavalleycf.org and someone will be happy to assist.

Best Wishes,

NVCF Staff

Note: This link is only valid for 24 hours. If the link has expired please reply to this email to contact support.

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.**

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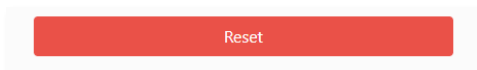
A confirmation screen will appear when complete. Additionally, a link will be available to return you to the main login page.

Returning to your GOfund account

Visit Napa Valley Community Foundation's website (napavalleycf.org) and click on **Fundholder Services** at the top of the page.
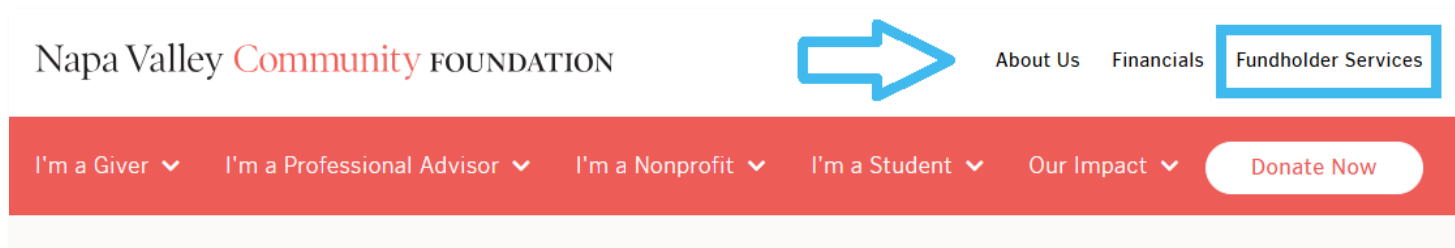

You can also navigate to GOfund directly by using the following web address:
https://gofund.akoyago.com/NAPAVALLEYCF

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".*
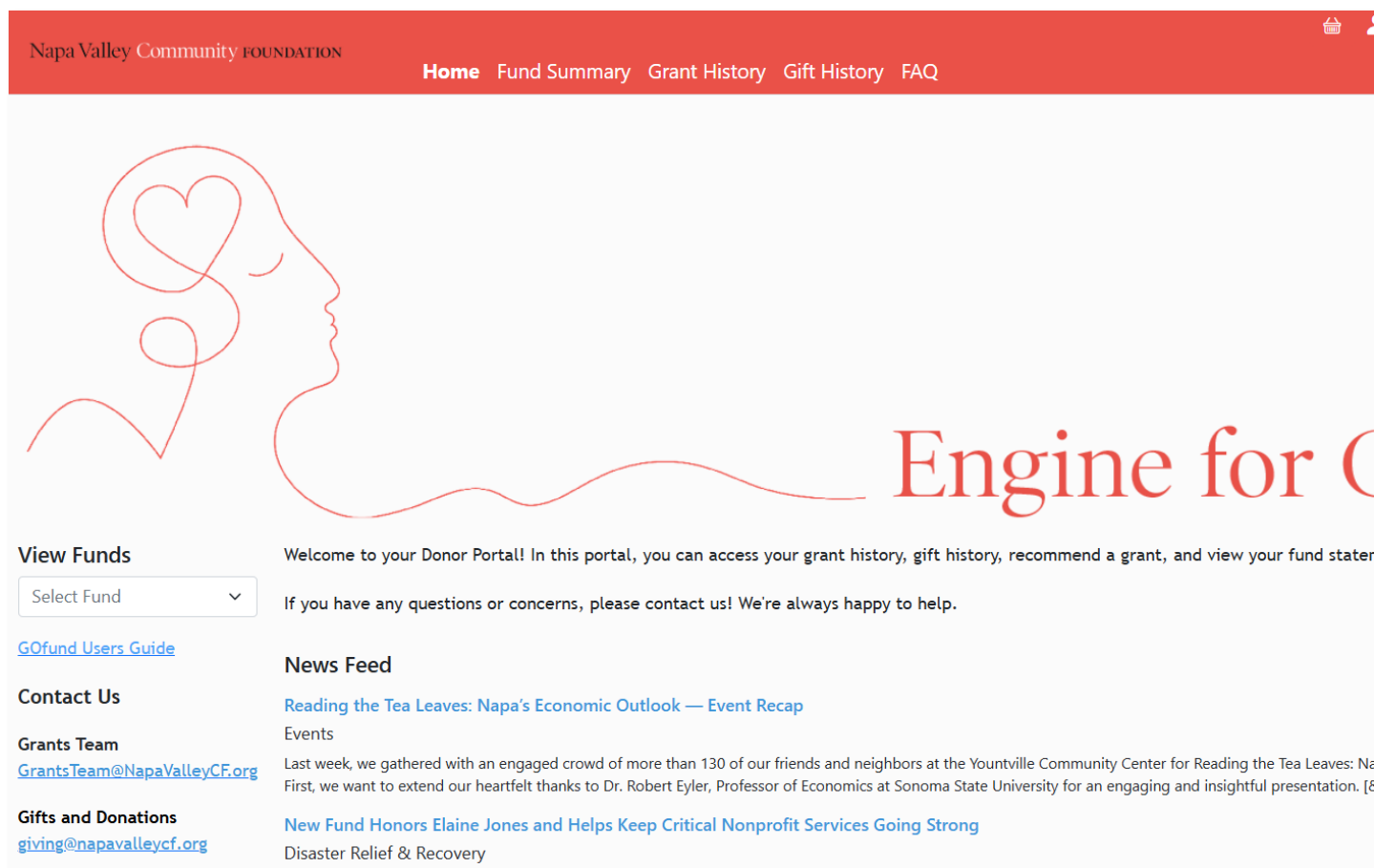
Fund Management Features

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".*

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.

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	Repeat Grant
Grant	Girls on the Run Napa & Solano, Inc.	$5,000.00	for general/operating support	12/11/2024	Paid	010100	Jane Doe Family Fund	Repeat Grant
Grant	Nimbus Arts	$10,000.00	for general/operating support	12/11/2024	Paid	010099	Jane Doe Family Fund	Repeat Grant
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	Repeat Grant
Interfund	Community Foundation of the Napa Valley	$1,000.00	to NVCF 30th Anniversary Fund	8/28/2024	Interfund	010097	Jane Doe Family Fund	Repeat Grant

Grant History ⬇ Export to Excel

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
an Organization

Organization Name * — C

Add dedication

Amount * — D
$
Distributions must be a minimum of $250.00

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 authorize distribution.

The advisor of the above named Fun 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 Later] [Submit Now]

Please review your grant recommendation details and read and check the certification clause before you click the Submit Now button. Click Submit Later if you want to submit multiple recommendations to review altogether in your cart.

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

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

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 GrantsTeam@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 GrantsTeam@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, GrantsTeam@napavalleycf.org or (707) 254-9565 x18 for assistance. You can also check out the **FAQ** tab for more information.