

# EMPOWERED

2025 | USER CONFERENCE | DETROIT, MI

## MANAGING DONOR & FUNDHOLDER CULTIVATION: FROM PROSPECT TO PARTNER

PRESENTED BY

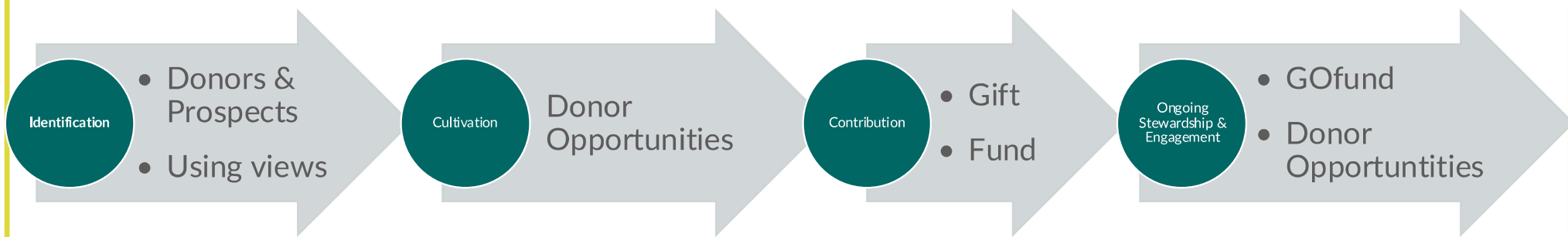
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akoyago

# MANAGING DONOR AND FUNDHOLDER CULTIVATION

- Donors & Prospects
- Views
- Donor Opportunities
- Gifts and Funds
- GOfund
  - Recommend a grant
  - Ongoing giving

# FROM PROSPECT TO PARTNER



# MEET OUR POTENTIAL DONOR

## Samuel and Susan Thompson

- **Background:** Lifelong residents of a small town served by the community foundation.
- **Career/Professional:** Susan owns EcoHarmony Solutions, a company specializing in environmentally friendly cleaning products.
- **Values:** Deeply committed to environment, local history, and youth development
- **Life stage:** Recently updated their estate plan, thinking about legacy and giving back
- **Financial standing:** Comfortable retirement, modest real estate holdings, and a strong appreciation for the community that shaped their lives



# DONORS & PROSPECTS

- How can we use akoyaGO to identify/target likely donors?
- What is a Prospect vs a Donor
  - Total Commitment

# DATA ENTRY – DONOR & PROSPECTS

- Start with a Dataverse search to check if a Donor, Contact, Constituent record(s) exist
- Formal Default vs Informal Greeting
- Donor Type; Organization vs Individual Household
  - Address to Use
- Strategy Fields

## Best Practice

One contact record can be connected to multiple Donor records

# DONOR & PROSPECTS – VIEWS

- Show how we can use Total Commitment to separate the prospects from the donors
- Active Prospects vs Active Donors
- Most Recent Gift Date, Count of Gifts, Largest Gift

# DONOR OPPORTUNITIES

- Used to cultivate/steward Donor
  - Different OOB Opportunity Types
  - Related to the Donor record
- How to view
  - From Donor
  - System Dashboard



## Best Practice

Enter the Opportunity directly from Donor record to make data entry easier and confirm you're not entering a duplicate

# FUND SET-UP

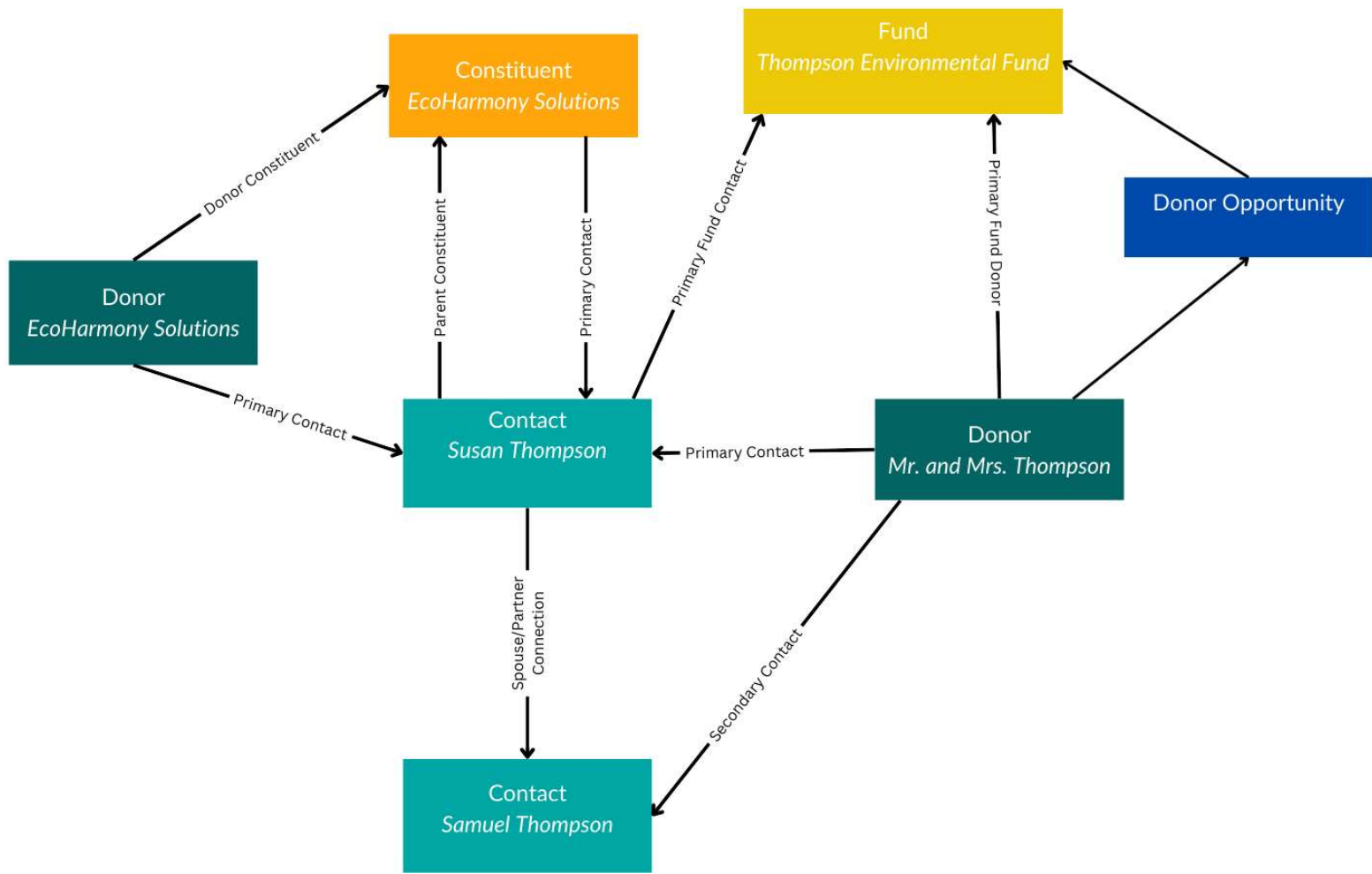
- Hooray! Our donor has elected to open a Donor Advised Fund! Now what?
  - Setting up the Fund in akoyaGO
  - Primary Fund Donor vs Primary Fund Contact
  - Generate Fund Agreement using Letter Templates
  - Fund Connections; Donor Portal Access (GOfund) and Fund Statement Recipient

## Best Practice

Funds should be entered in akoyaGO CRM, not directly in Business Central

# REVIEW OF RECORDS CREATED

- What have we created so far?
  - Constituent
  - Contacts
  - Donors
  - Donor Opportunities
  - Fund



# GIFT RECEIVED

- Entering/Processing the Establishing Gift
  - From the Donor Opportunity (using *Create Gift from Donor Opportunity workflow*)
  - Processing gifts given via GOdonate
    - Setting this gift on the Donor Opportunity

## Best Practice

If manually entering a Gift/Gift Payment, start from the Donor record!

# CLOSING DONOR OPPORTUNITIES

- Confirm Opportunity has all info (fund, gift)
- Mark as WON!



# ENGAGEMENT VIA GOFUND

- Fundholder now can
  - Recommend grants
  - Give to my fund

Remember to register for our Annual fundholder event on Dec 1, 2025!

Edinboro Charitable Fund (00039)

Donate Recommend a Grant Documents View Fund Statement

Fund Balance: \$6,489,515.83

Spendable\* Balance: \$6,483,515.83

\* This is the available amount to spend less any pending recommendations and payments in process.

Recent Grants Payments

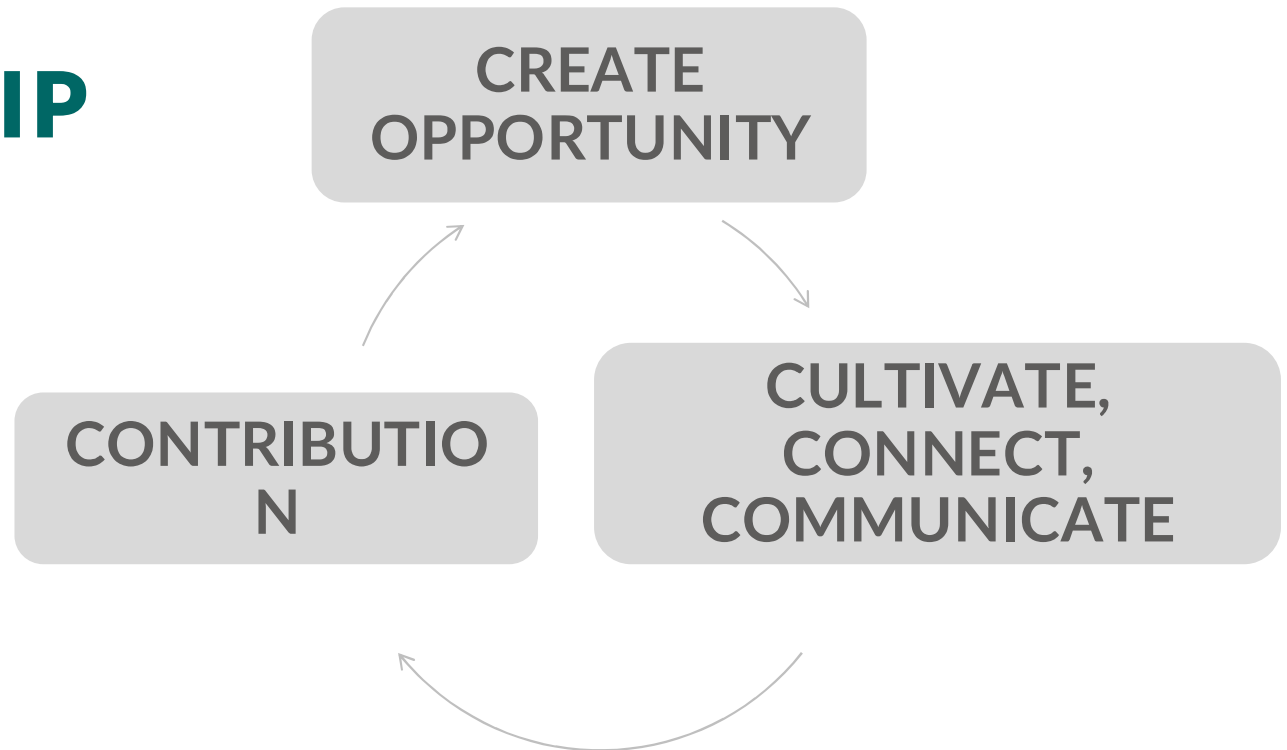
Request Applicant	Net Amount	Amount	Payment Status	Purpose	Formal Fund Name	Decision Date	Payment Date	
Perfect Tenn Academy	\$5,000.00	\$5,000.00			Edinboro Charitable Fund	4/13/2025		<a href="#">Repeat Grant</a>
JustFaith Ministries - Health	\$500.00	\$500.00	Paid		Edinboro Charitable Fund	3/31/2025	3/31/2025	<a href="#">Repeat Grant</a>
1 Foundation Inc. - Headquarters					Edinboro Charitable Fund	2/27/2025		<a href="#">Repeat Grant</a>

[See Full Grant History](#)

# ONGOING STEWARDSHIP

- Continue to utilize Donor Opportunities
  - These are not just for prospective new donors!
  - Continue to use to track stewardship

# BUILDING A PARTNERSHIP



# THANK YOU

Presented by

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