

Modernizing Your DAF Fundraising Strategy

Expert Series

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Today's Hosts



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Agenda

- 01** Introductions and Housekeeping
- 02** DAF 101
- 03** Building Relationships with DAF Donors
- 04** Modernizing Your Giving Experience for DAFs
- 05** Maximizing EOY with DAFs
- 06** Q&A

Housekeeping

- Submit questions in “Q&A” as we go
- This session is being recorded and will be shared following the webinar
- We will have a dedicated time at the end for questions and discussion so be sure to stick around

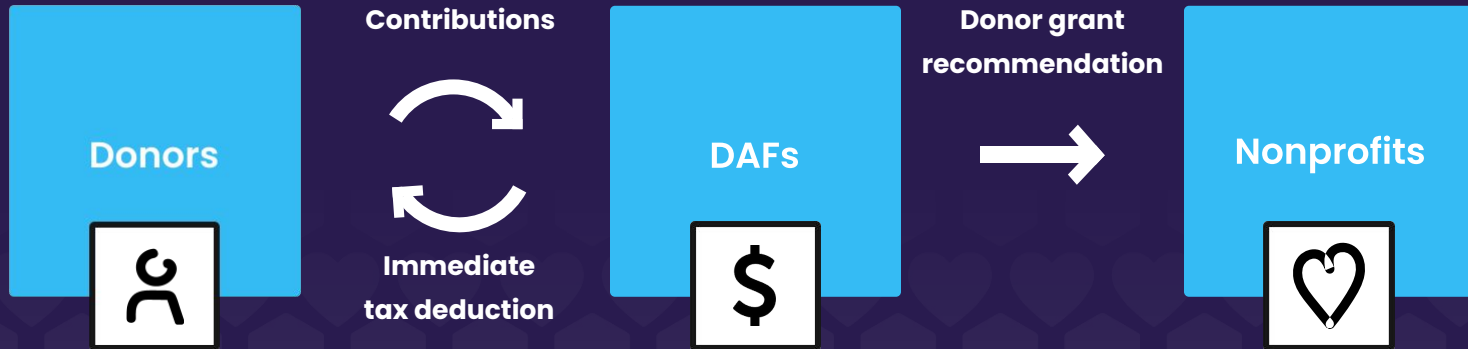
Section One

DAF 101



In 2021, a record \$234 billion were held in Donor Advised Funds (DAFs)

A specialized **financial account for charitable giving**. It allows donors to make a charitable contribution, receive an immediate tax deduction, and recommend grants to 501c3 organizations over time



The fastest growing vehicle in philanthropy

Donor Advised funds are no longer considered just a tool for the wealthy. In the last 5 years, DAFs have started gaining mainstream adoption.

The democratization of DAFs

1. Low account minimums
2. Significantly lower fees
3. Offered as an employee benefit

Total DAF assets

\$234B

2021-2022

+40%

DAF accounts

1.3M+

2021-2022

+30%

1. Median account balance at Fidelity Charitable-- the largest Donor Advised Fund with 150k+ accounts and \$35B in AUM (Fidelity Charitable 2021 Report)

2. Nprtrust 2022 DAF Report

Who donates via Donor Advised Funds?

1.2 M+

DAF accounts
in the US

\$182K

Average DAF
account size

\$45.7 B

Grants from
DAFs in 2021

Individuals, families, or groups can contribute to their DAF account and then advise the DAF provider how the money is invested & given out via **grants** to nonprofits. Donor can indicate if gift is unrestricted or designated to a specific cause /program.

Who operates a Donor Advised Fund?

DAF accounts are maintained and operated by 501(c)(3) organizations called a **sponsoring organization**.

These DAF providers can include:

Communal DAFs



Commercial DAFs



Benefits for Donors



Maximizing tax benefits

Donors can make immediate tax deduction when contributing to a DAF + grow contributions over time (tax-free).



Flexible funding options

Decide when, what, and where to give, as typically requires no annual distribution + options for anonymous granting.



Contribute wide range of assets

This includes cash, stock, and crypto.



Charitable legacy

Can be an "easy to establish" option to allow family to continue philanthropic giving.

Benefits for Nonprofits



Tap into new major donors

With a DAF fundraising strategy, nonprofits have an opportunity to tap into \$234B DAF Market.



Larger gifts

Because of tax benefits, opportunity to receive higher donations, with the average grant size from a DAF is \$4,800.



More intentional giving

When donors open DAF accounts, they typically more thoughtful about their charitable giving impact and give more frequently. On average, number of grants per DAF per year is 12 gifts.

Section Two

Building Relationships with DAF Donors

Take advantage of the fastest growing vehicle in philanthropy

Solicit

Raise

2.2x more

by directly soliciting DAF donations

Offer your donors a

fully integrated

DAF donation option

Convert

Increase donation volume

176%+

by removing unnecessary steps

The average DAF donation is

\$4.1k

Engage

Get access to DAF donor

contact info

to foster major donor relationships

DAF donors are

33%

more generous than the avg. donor

Save your organization

time and resources

spent on manual DAF processes

Educate Your Donors



Include references to donor-advised funds in your direct mail or other fundraising materials,



Add a section about donor-advised funds to your “ways to give” webpage



Discuss DAFs in your planned giving conversations with major donors



Keep a record of DAF gifts so you can thank and reengage donors later.

Tips for Finding & Engaging DAF Donors

When looking for & engaging with DAF donors, here's some additional tips to grow lasting relationships.

Know Your Donors

Find, educate, and strengthen relationships with DAF donors, sharing more about how their gift can make a difference in your organization. Never underestimate the power of asking directly in a one-on-one conversation, "Do you know about donor advised funds?"

Reach out to DAF donors in a variety of ways

Donors won't know you can accept DAF donations until you tell them directly. Consider all the ways you currently communicate with supporters and how you can share DAFs through each channel.

Solicit DAF donors for immediate needs

Because DAF funds are immediately available, many donors give to charity when donations are urgently needed. Reaching out to DAF donors when your organization urgently needs funding is a great way to show donors the huge impact they can make with their contributions. For example: In 2022, Fidelity saw \$128 million from its DAF funds go directly towards charities responding to the Ukrainian humanitarian crisis.

Internal DAF Fundraising Strategies



Communicate with your team

Educate team on DAFs and how to communicate your grant needs effectively.



Craft a communication plan

Create plan to engage with DAF donors for your staff & board members to follow.



Send targeted emails

Target DAF donors with specific appeals via direct mail, email, and social media.

Section Three

Modernize Your Giving Experience For DAFs

Integration Benefits

Thanks to our partnership with Chariot, the once complicated DAF donation process is now seamless. Our native integration allows nonprofits to accept Donor Advised Fund donations directly on The Giving Block's donation form with just three clicks.



Accept DAF donations directly from your website.

Donors no longer need to leave your website to connect their DAF, it can now be done through The Giving Block's donation form.



Collect and track DAF donation information

Nonprofits can collect DAF donor information & track gifts within The Giving Block's dashboard.

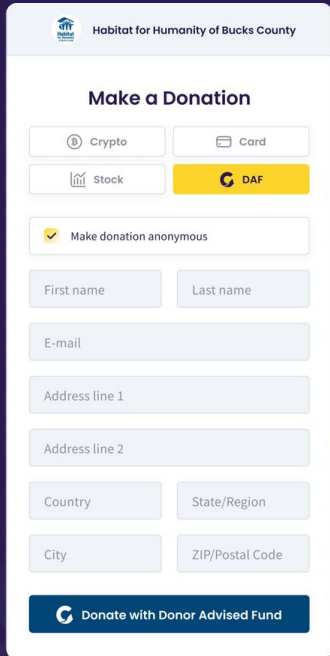


Save donors time with direct DAF provider integrations:

Chariot currently has integrations with over 60% of the market, including the leading DAF providers.

DAF donations in just three clicks

The first and only integrated payment option that enables donors to give with their DAF in three simple clicks directly on a nonprofit's website.



Habitat for Humanity of Bucks County

Make a Donation

Crypto Card

Stock DAF

Make donation anonymous

First name Last name

E-mail

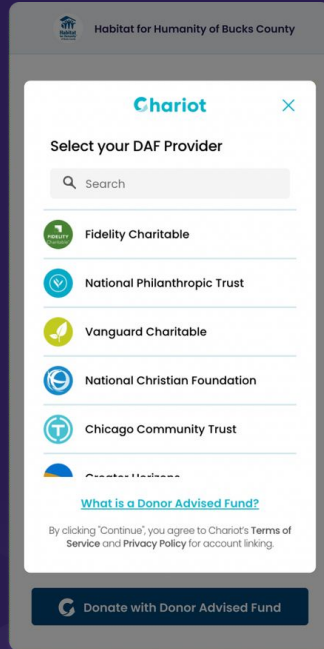
Address line 1

Address line 2

Country State/Region

City ZIP/Postal Code







[Donate with Donor Advised Fund](#)



Habitat for Humanity of Bucks County

Chariot

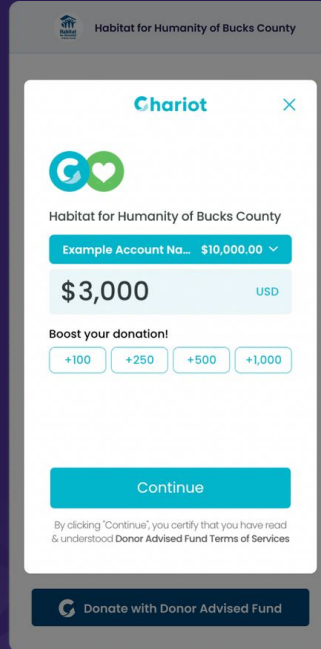
Select your DAF Provider

-  Fidelity Charitable
-  National Philanthropic Trust
-  Vanguard Charitable
-  National Christian Foundation
-  Chicago Community Trust
-  Crest Foundation

[What is a Donor Advised Fund?](#)


By clicking "Continue", you agree to Chariot's Terms of Service and Privacy Policy for account linking.

[Donate with Donor Advised Fund](#)



Habitat for Humanity of Bucks County

Chariot



Habitat for Humanity of Bucks County

Example Account No... \$10,000.00

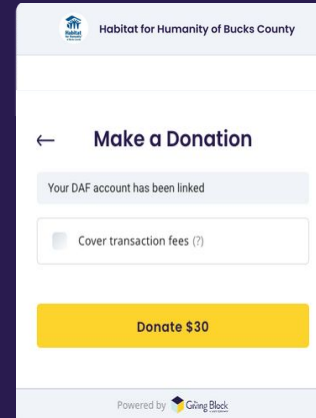
\$3,000 USD

Boost your donation!

[Continue](#)

By clicking "Continue", you certify that you have read & understood Donor Advised Fund Terms of Service

[Donate with Donor Advised Fund](#)




Habitat for Humanity of Bucks County

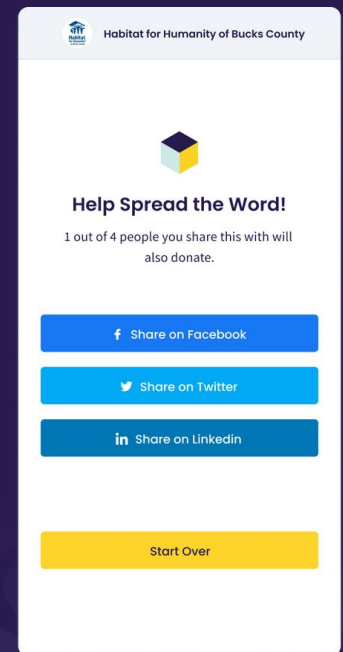
Make a Donation

Your DAF account has been linked

Cover transaction fees (?)


[Donate \\$30](#)

Powered by 



Habitat for Humanity of Bucks County

Help Spread the Word!



1 out of 4 people you share this with will also donate.

[Share on Facebook](#)

[Share on Twitter](#)

[Share on LinkedIn](#)

[Start Over](#)

Donation data in your dashboard

View all your DAF donation data natively in your The Giving Block dashboard, along with your other asset fundraising donations.

Plus, this is compatible with all our CRM integrations, including Salesforce, Blackbaud, NeonCRM, Zapier, and more.

Transaction Details		×
ID	1838	
Date	5/3/2023	
Time	Org name	
Organization	Animal Humane New Mexico	
Donor Name	Donor name	
Donor E-mail	Donor email	
Receipt Sent	No	
Anonymous Donation	Yes	
Payment Type	Donor Advised Fund (DAF)	
Chariot ID	14652	
Frequency	Once	
Origin		
Gross Amount	\$20.00	
Net Amount	\$19.12	
Transaction Status	Captured	
Donation Notes	-	

First name

Last name

Amount

DAF provider

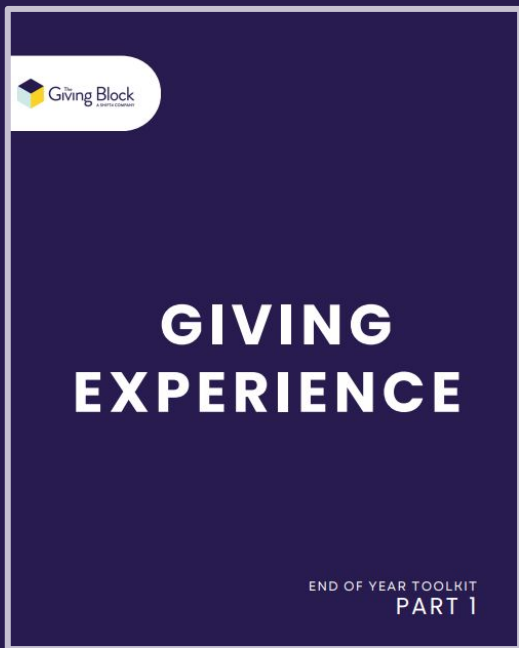
Email

Section Six

Q & A



Don't Forget! Finish Your Checklist

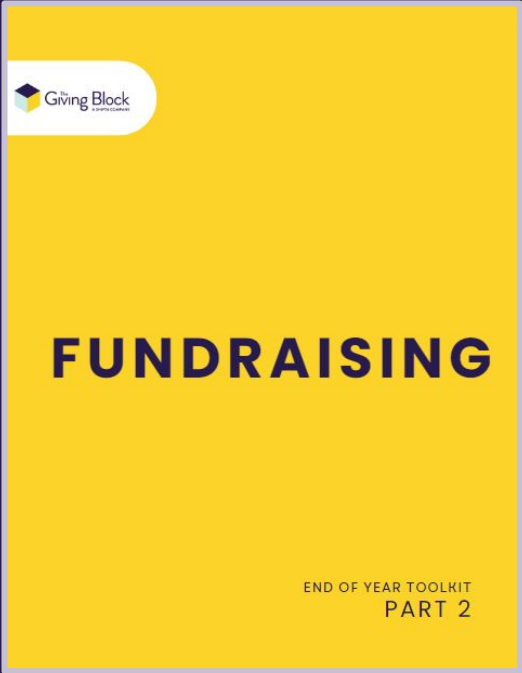


A **step-by-step guide** for maximizing Crypto, Stock + Donor Advised Fund Giving Experiences during year end fundraising.

Steps Inside

1. Audit Your Giving Experience
2. Improve Your Giving Experience
3. Set Your Fundraising Priorities
4. Finalize Your 2023 Giving Experience

Reminder: EOY Key Dates



Once you've completed Toolkit Part 1: Giving Experience, check out **Toolkit Part 2: Fundraising**.

What's Inside?

- 1. Year-End Calendar
- 2. Match Dollars
- 3. Updated Product Suite
- 4. Fundraising & Marketing Strategy
- 5. Custom Content via ChatGPT