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Ethics, Logistics, & Strategy

DAF

A Conversation

BOYOND THE NUMBERS - 2026

Presented by:

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Comments & Concerns

I feel late to the conversation.

I’m worred about anonomous gifts

How do I find out out much $ is in the DAF?

Why would they use a DAF?

Is this another giving fad?

Are we in competition with the sponsor org?

I don’t like them. It feels like DAFs are everything that is icky about philanthropy. They feel exclusionary right when we’re trying to be inclusive?

Am I crazy?

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Development leaders must understand the DAF ecosystem

Vocabulary & State of DAF - land

How not to sound like an idiot
(even if you are)

Don’t’s and Do’s (and why)

What fundraisers need to remember and expect.

Business of DAFs

DAFS are big business, What are the 800 lb gorillas doing?

Policies

Implementing DAF smart policies in your org. Planning for the future.

Questions & (unsatisfying) Answers

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Sponsor Organizations

1,500+ Sponsor orgs

- 800+ Community Foundations
- 600+ Single issue (religion / Edu)
- 100+ National Financial Institutions

- New Wealthy Individuals
- Existing donors / new giving strategy
- Grant Distribution

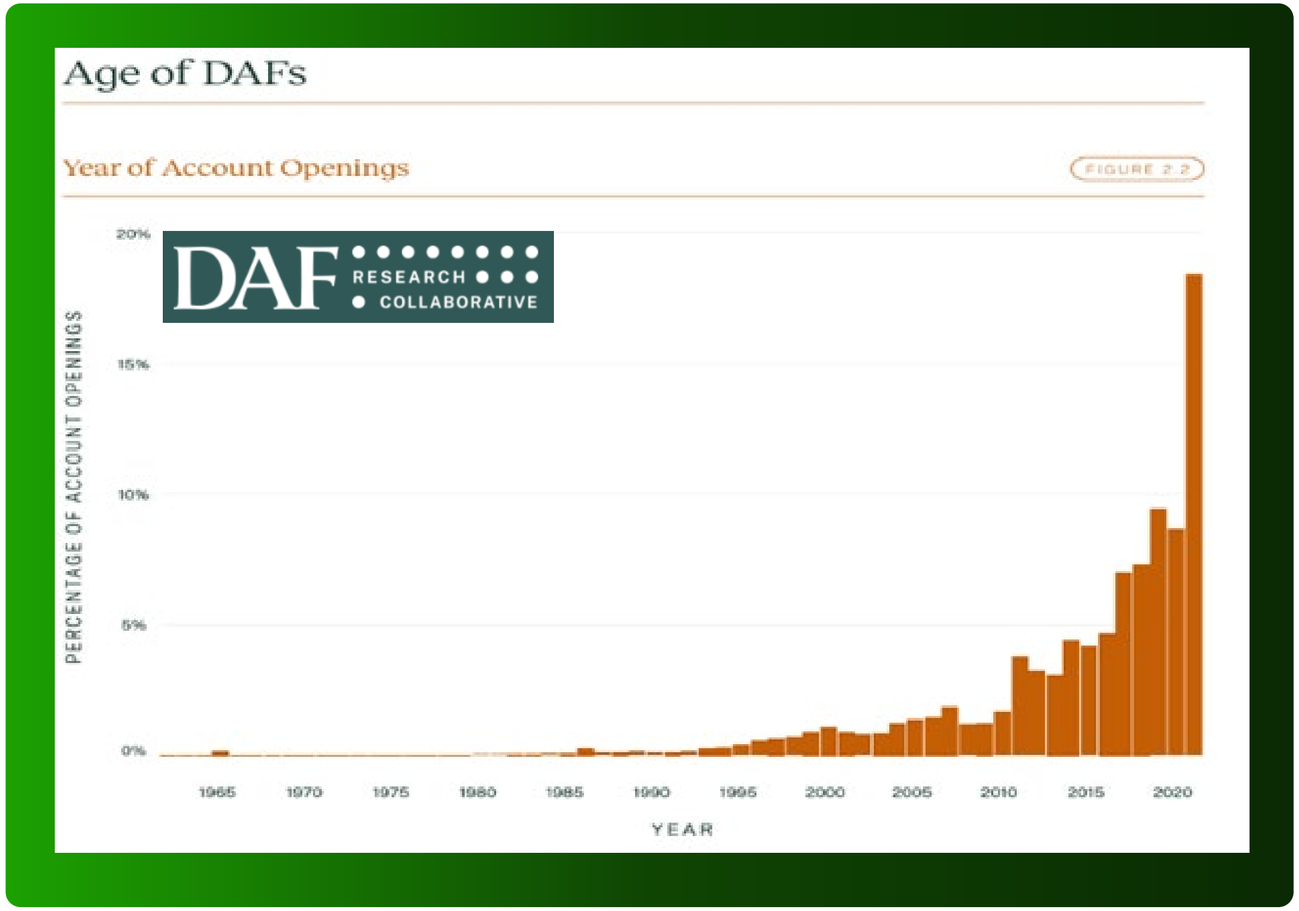


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About the DAF Donor

Nonprofits, and the fundraisers who support them, are small players in the DAF landscape. Each DAF donor is on their own journey.

www.dafresearchcollaborative.org/research/national-study-dafs



Donor - Advised Funds: A type of charitable bank account where donors can only give to 501c3s.

Think about the hockey stick of adoption

Midrange donors... for now

Smart Chairty, Smart Philanthropist, Smart Legacy

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gofundme

www.gofundme.com/c/giving-funds

No fees, no minimum balance,
DAF to DAF transfers

Mid Range Donors

Expect an up-tick of your mid-range donors to disproportionately give out of their DAFs. They are marekted toward up-market professionals.

LOOK TO THE FUTURE

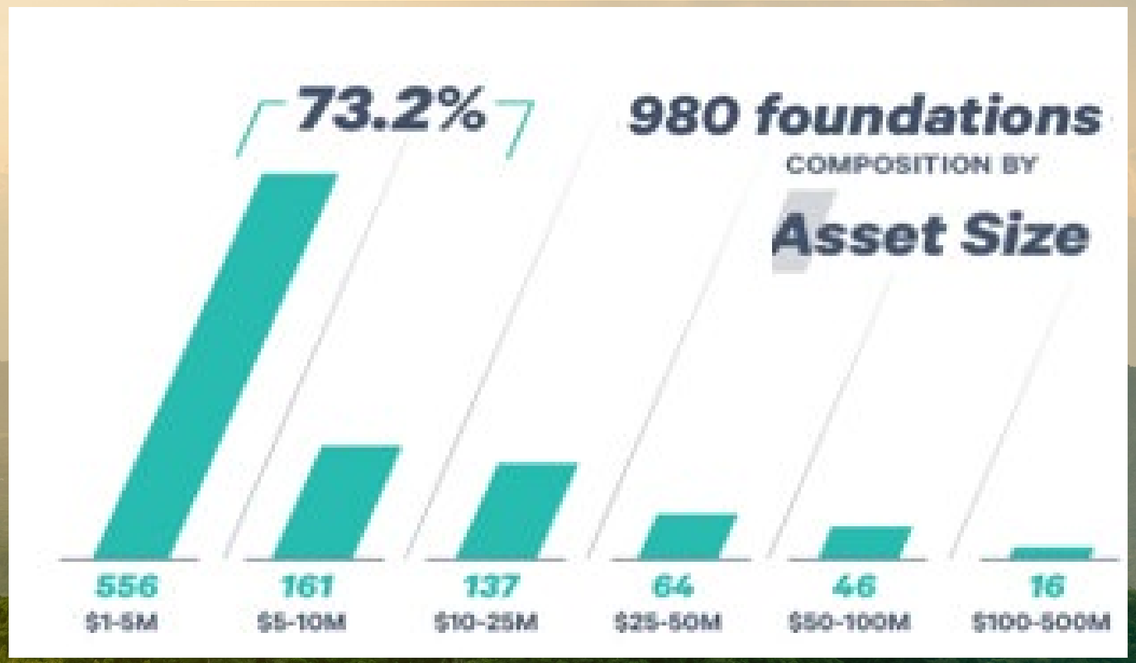
Be prepared for micro-DAFs (Gofundme, Daffy…)

Check out: www.fidelitycharitable.org/nonprofits.html

DAF RESEARCH COLLABORATIVE



FOUNDATIONSOURCE



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Intersection of DAFs and Private Foundations

DAFs

- SO is a 501c3
- Counts toward public support test
- Easy to set up

DAFs -- usually

- 1-2 decision makers
- will be around for generations

Naming Confusion

"Foundation"
Donation v grants
Legacy DAFs

Banks Language

- Grants
- EFT
- TY
- Data

Social bonds

Inclusive, parrtnerships w/other orgs, famiily

DAF/Foundation partnerships

Intergenerational

Family wealth building

Plan Internal Policies Now

Foundations

- 990-PF searchable
- 5% minimum
- Expensive to set up and run
- Gov oversight (limited)
- Private Equity

Communication

Each DAF/PF has it's own approach

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DON’Ts and DOs

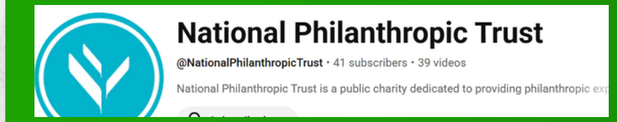


Money is anything that can be used as a medium of exchange and accepted as payment for goods and services.



- Ask a DAF donor to sign a pledge form.
- Promote to DAF donors that it’s tax deductible,
- Use for tickets or auction items / Incidental Benefit
- List individual DAFs in your 990 (Instead, group them all together under the sponsor org)
- Call out for DAF donors (ew)
- Ask on behalf of a political candidate
- **Partial pay for sponsoships**

- Engage directly: Ask HOW they would like to participate--Matching gift? Meet a client? Campaign?
- Get naming right: Jane Zoe or the Zoe Foundation, Frank,
- Practice good data hygiene
- Read the notes field
- Plan for LONG term stewardship / Family inclusive
- Thank them for their support (but not donation)
- OK to use DAF for raise the paddle (with restrictions)
- Track DAFs as Soft Credit
- Create DAF personas
- Support your team--what do they need from you?



Watch 1st ½ Video “Can I Buy That with my DAF?”

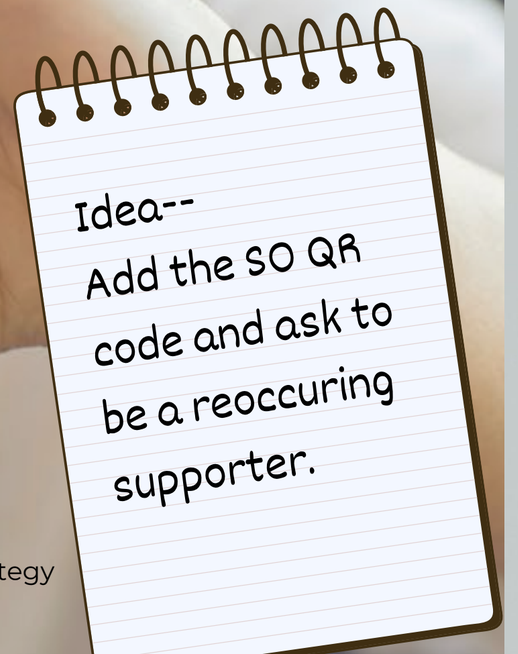
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Thank You Notes



Each sponsor org will have their own process to (or don't) acknowledge receipt: Follow, and track, instructions.

- Suggest it's a tax donation
- Date Given and Received
- Name of Fund & Sponsor Org
- To: As requested
- Acknowledge : Notes & Delay
- Opportunity to connect, Be Creative



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DAF Critique



Money is not ethically neutral

Billions shift from DAF to DAF

DAFs as Investment Vehicles

Not yet tested in the courts

Inheritance, rogue SO guidelines, political pressure (SPLC)

Tax benefit now, but no oblication for funds to benefit society

Race/Equity

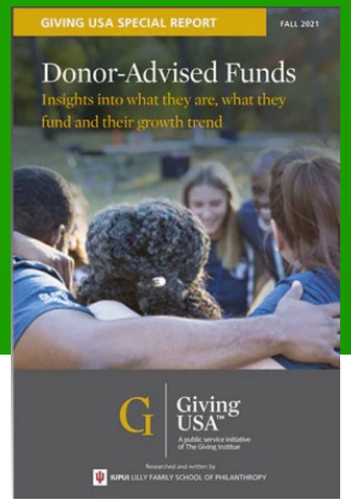
Wealth hoarding, Financial Red Lining, Hate Groups, You can't engage with what you can't see, marketing

Philanthro -capitalism &
The Tragedy of the Commons

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LILLY FAMILY SCHOOL OF PHILANTHROPY
INDIANA UNIVERSITY
IUPUI




Courses



Industry Reports



Political Influences



Reporters/ Advisors


Legal challenges



More Research

- The DAF Report This is now the gold standard for data… NOTE that the largest DAFs are not included in this report as it would compromise anonymity. www.dafresearchcollaborative.org
- Recurring Giving Report 2024 - Neon One
- DAF Fundraising Report from Chariot

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“DAFs are a seismic shift in the giving landscape.

Development Leaders must prepare.“

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thank you!