

Product Office Hours:

DAFpay on GiveCampus

Thank you for joining us



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Agenda



Partnering with Chariot

Why Offer DAFpay on GiveCampus?

Demo:

- Donation Experience
 - Email Confirmation
 - Reporting
-

Q & A

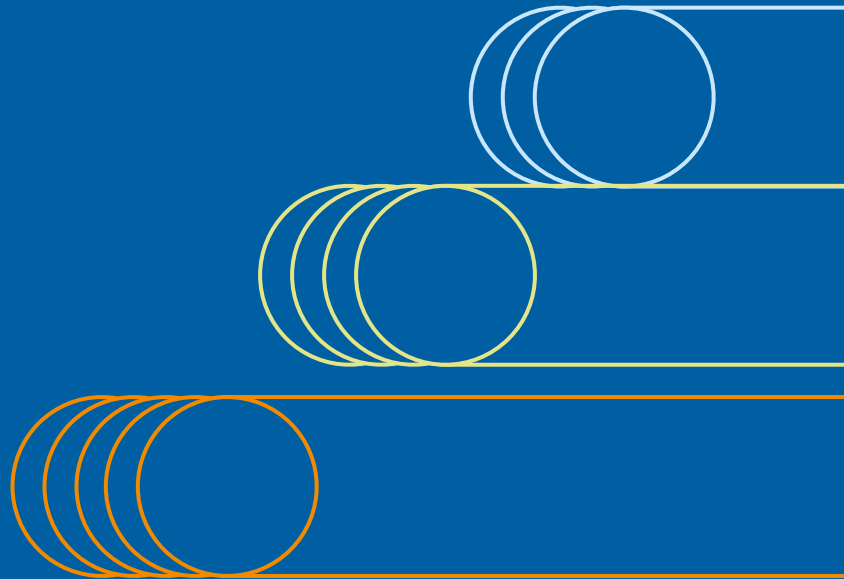


Who is Chariot

Chariot

Why offer DAFpay on GiveCampus

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Donor-Advised Funds Are Growing

DAFs are the **fastest growing** vehicle in philanthropy.

Gaining Mainstream Adoption

\$230B

Total DAF assets

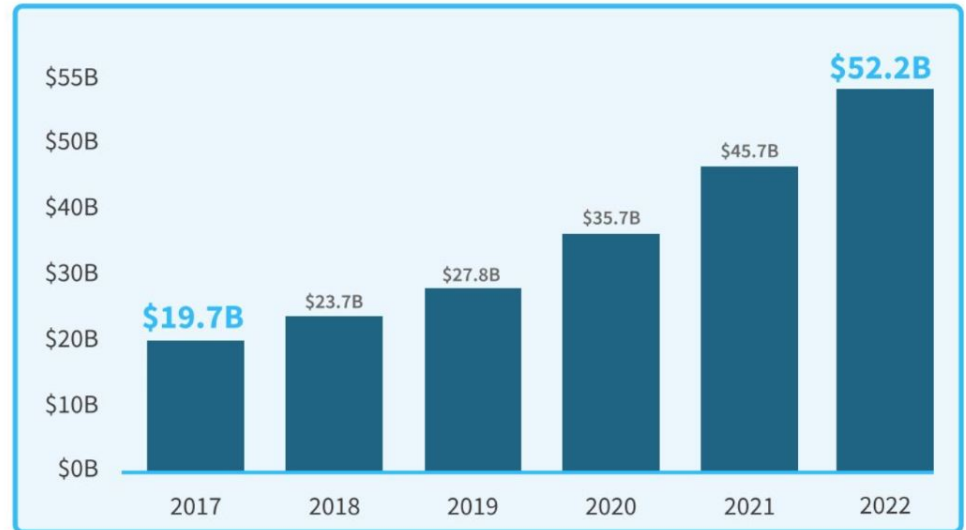
3M

Individuals using
DAF accounts

+85%
in 5 years

2.3x
in 5 years

From 7% to 17% of US philanthropy since 2017



Donor-Advised Funds & Education

DAFs are the **fastest growing** vehicle in philanthropy.

\$52B

Annual grants distributed from DAFs.

~\$12.3B

Annual grants distributed from DAFs *to EDUs in 2022*

A clunky giving experience for donors

Every redirect, click, or webpage is an opportunity for a donor to disengage.

1



Donation trigger (social media, email)

2



Navigate to charity's payment page

3



Can only donate with credit card

4



Navigate to DAF website

5



Login to DAF account

6



Monitor account balance

7



Select "Grant to Charity"

8



"Search Charities" by name, Tax ID, or EIN

9



Confirm charity

10



Designation, privacy, personal note

11



Determine amount and frequency

12



Confirm and submit

15
clicks

10
redirects

4
webpages

Challenges for Donors & Schools

Every **redirect, click, or webpage** is an opportunity for a **donor to disengage**.

Bad Donor Experience

- Challenging Experience for Donors
- Easy to give to the wrong EIN
- Too many disjointed steps

Lack of Data

- Lack of Information on DAF gifts
- Many Anonymous DAFs
- No Tracking ID

Time Delay

- Not aware of DAF gifts until several weeks after the donor takes action
- Delayed or impossible stewardship

Opportunities for GC Partners

Elevate and optimize the DAF experience for donors and your team.

Identify New DAF Donors

- Better experience for your most important donors
- Identify new donors with capacity and inclination

Eliminate Processing Burdens

- Receive all necessary information to credit, steward, and reconcile gifts appropriately
- Better informed of DAF intent

Celebrate DAF Donors Quickly

- Real time updates on campaign pages
- Immediate acknowledgement & stewardship

Donor Behaviors with DAFpay

What you can expect from DAFpay donors.

Average Gift Size

\$1,250

Median Gift Size

\$200

Giving More

8X

increase when a donor moves from CC gift to DAFpay gift.

30%

increase their gift within the DAFpay widget

Retention

+15%

Increase in donor retention from DAF donors

Age

55 years old

Average age of DAF donors >40 is the fastest growing demographic

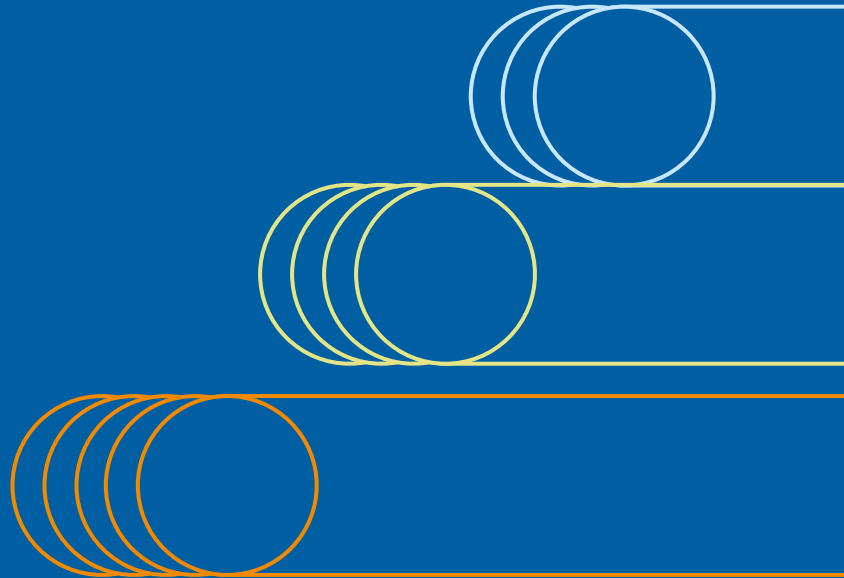
DAF Account Size

56% > \$25K

DAFs are no longer just for the old and the rich

Onboarding

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DAFpay Onboarding

GiveCampus has partnered with [Chariot](#) to accept Donor-Advised Funds (DAF) gifts online with DAFpay. Creating an account is required but will not automatically enable DAFpay on GiveCampus. You can enable DAFpay after you've created your account. Chariot is accelerating onboarding for GiveCampus partners in February and March 2025. Additional information for Know Your Customer (KYC) verification requirements will be required later in Spring.

[Learn more](#) about enabling gifts via DAFpay on GiveCampus.

If your school already has a Chariot account, complete the set up information below to connect your account to GiveCampus.

If your school does not have a Chariot account, complete the set up information below and follow the instructions on the next page.

Setup Information

First Name *

Last Name *

Your School Email Address *

School EIN Number *

Confirm School EIN Number *

EIN must be in the format ##-#####

I agree to the GiveCampus [Terms & Conditions](#) required to enable DAFpay.

Next




GiveCampus partners with Chariot for secure Donor Advised Fund donations and payouts

[← Return to GiveCampus](#)

Sign up for Chariot

Sign up

OR

 Sign up with Google

Already have an account? [Sign in](#)

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Enable DAFpay

GiveCampus has partnered with [Chariot](#) to accept Donor-Advised Funds (DAF) gifts online with DAFpay. Chariot is accelerating onboarding for GiveCampus partners in February and March 2025. Additional information for Know Your Customer (KYC) verification requirements will be required later in Spring.

[Learn more](#) about enabling gifts via DAFpay on GiveCampus.

Thank you for confirming the Chariot account for Casey University.

Enable DAFpay

Enable DAFpay across all forms and campaigns when the integration is complete.

Update DAFpay

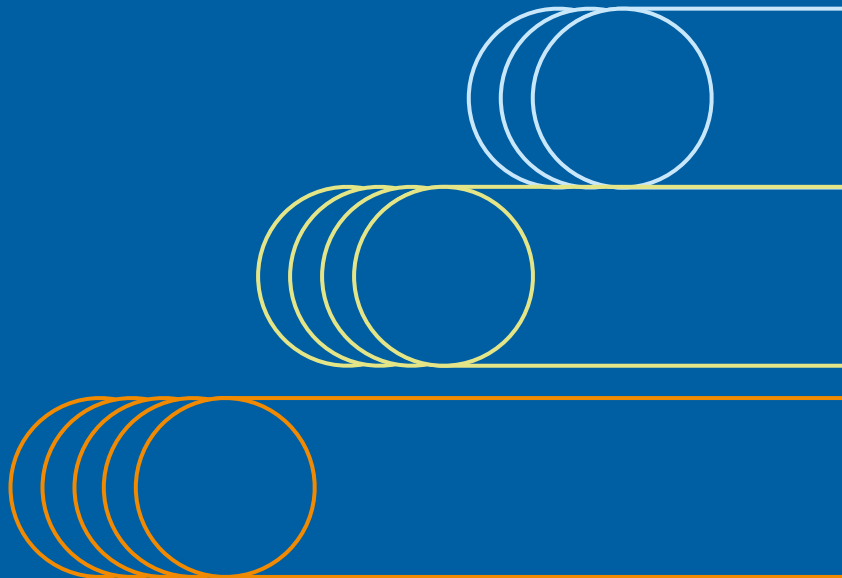
Complete your DAFpay Onboarding and win an extra ticket to GCPC 2025

- Attend our GiveCampus Partners Conference 2025 on August 5-7 in Washington, D.C.
- Chance to win one of three additional GCPC tickets for schools that onboard with DAFpay by April 1st, 2025.
- Get your onboarding done today and start using DAFpay on April 1



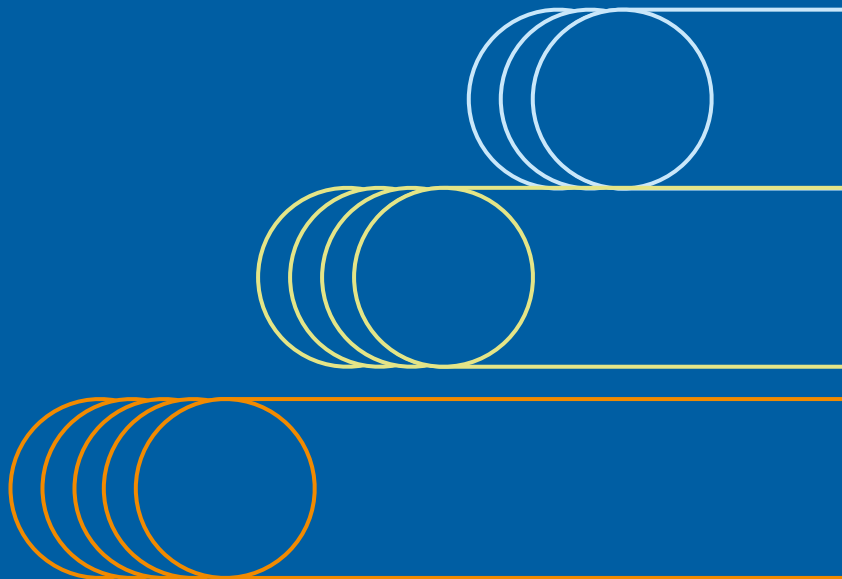
Let's see it in action

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FAQs

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What does it cost!

- **Do I need to pay anything up front?**
 - **No. DAFpay is included** in all GiveCampus Online Giving subscriptions (inclusive of Social Fundraising and Giving Forms).
- **Do DAFpay count towards my Social Fundraising Subscription or Giving Forms Payment Processing Bundle?**
 - **Yes.** Gifts will count towards your subscription and pre-paid payment processing bundles like any other gift. If you do not have pre-paid payment processing on an Online Giving solution then DAFpay gifts will be invoiced monthly the standard payment processing - like any other payment method.

How does DAFpay work with Incentives?

- **DAFpay is *not* available to donors when an incentive is selected**
 - Giving via a DAF cannot result in the donor receiving more than an incremental benefit.
 - Because incentives often more than an incremental benefit, and a fair market value you cannot use DAFpay as a payment method while accepting an incentive.
 - **If an incentive is selected, DAFpay will disable automatically.**

DAFpay and Pledge Payments

- DAFs cannot be used to fulfill legally binding pledge
- DAF sponsor cannot make any reference to the existence of the pledge when it makes the grant

The image shows a mobile application interface for DAFpay. The main screen displays a donation form with the following fields:

- Gift amount:** \$500
- Express check:** (checkbox)
- Your information:**
 - First name:** John
 - Email:** johnd@...
 - Address:** 123 Main St, San Francisco, CA

A modal window titled "DAFpay" is overlaid on the form, showing a "Donation amount" of \$100 with an "Edit" button. Below this, there are buttons for "+50" and "+100". A "Note" field with an "Add message" link is also visible. At the bottom of the modal, there is a "Donate" button and a confirmation message: "By continuing, you confirm that your grant is free from private benefit, does not fulfill an existing obligation & complies with Fidelity Charitable's donation guidelines." The background of the app shows a dark theme with a blue and green gradient.

How can we ensure the Donor Selects the Right Org / EIN

- **The donor no longer needs to take this action**
- When you onboard DAFpay, you enter the EIN.
- That is attaching your DAFpay experience to your organization's EIN – so all the school needs to do is give through your form!
- Donors can select additional designations on your form like any other gift

Acknowledging DAFpay Gifts



- Online Giving
- Home
- Campaigns
- Idea Submission
- Campaign Backup Form
- Giving Forms
- School Pages
- Smart Appeals
- Personalization
- Texting
- Manage Gifts
- Reporting
- Banking & Deposits
- School-Level Settings
- Affiliations
- Branding
- Company Matching
- Designations
- Donation Form
- Email Marketing
- PayPal
- DAFpay
- Recurring
- Registered Devices
- Reusable Form Fields
- School Fields
- Stripe
- Tax Receipts
- Webhooks
- Other
- Administrators

Onboarding [Email Confirmation](#)

DAFpay Confirmation Email

While nearly all donations on GiveCampus are tax deductible for your donors, gifts made via Donor Advised Funds are not. It's important that your confirmation email does not include these tax receipts from their Donor Advised Fund providers and do not need a tax receipt when issuing grants out of their DAFs.

Email Content

Sender Name *
Demo University

Reply-to Email Address *
advancement@demouniversity.edu

Sender Email Address *
info@givecampus.com

Subject Line *
Thank you for your DAF gift to \$SCHOOL_NAME!

Insert Subject Merge Tags
Select Merge Tag

Will insert the selected merge tag at the cursor position in the subject line.

Body - Text

+

= Dear \$FIRST_NAMES,

Thank you for recommending a grant from your Donor-Advised Fund to \$SCHOOL_NAMES. Your support is critical to our community — we deeply appreciate your commitment and generosity.

Your grant request details are as follows:
Requested by: \$DONOR_NAMES
Request Date: \$DONATION_DATES
Request Amount: \$DONATION_AMTS
Request Designation(s): \$DESIGNATION_WITH_AMOUNTS
Grant Requested From: \$DAF_PROVIDERS

We will inform you when we receive your grant.
This is not a tax receipt. Please print or save this message for your records.

With gratitude,
\$SCHOOL_NAMES



Dear Carl,

Thank you for recommending a grant from your Donor-Advised Fund to Demo University. Your support is critical to our community — we deeply appreciate your commitment and generosity.

Your grant request details are as follows:

Requested by: Carl Weis

Request Date: March 25, 2025

Request Amount: \$4,500.00

Request Designation(s): 2024 Athletics: \$2,500.00, AAAA Trustee Scholarship: \$2,000.00

Grant Requested From:

We will inform you when we receive your grant.

This is not a tax receipt. Please print or save this message for your records.

With gratitude,
Demo University



Reporting Fields for DAFpay Gifts

Existing Fields:

- **payment_processor:**
DAFpay
- **card_type:**
DAF Provider
 - Ex: Fidelity Charitable

Dates:

- **dateof_pledge:**
DAF grant distribution has been initiated by the Donor. The donor has completed the GiveCampus form.
- **dateof_capture:**
Grant distribution request has been successfully created and will be sent by the DAF. (Similar to a credit card approving a transaction).
- **dateof_deposit:** blank
GiveCampus and Chariot do not have insights into when the DAF sends grant distributions.

States:

- **Authorized:**
DAF grant distribution has been initiated by the Donor
- **Paid:**
Grant distribution request has been successfully created and will be sent by the DAF. (Similar to a credit card approving a transaction)

Reporting Fields for DAFpay Gifts

New Fields:

- **daf_fund_id**
 - *The ID of the DAF provider*
- **daf_grant_id**
 - *The unique ID of the grant itself*
- **daf_tracking_id**
 - *The tracking ID of the grant.*
 - *This will be included when you receive the DAF funds.*

Receiving DAFpay Funds

- Grants initiated via DAFpay will arrive via check or Electronic Fund Transfer (EFT) **directly from the DAF provider**
 - *DAF gifts will not show in GC deposit reports*
- Look for the "Tracking ID" and "Gift through DAFpay" message in the grant note
 - The 'Tracking ID' will correspond with the daf_tracking_id from your GiveCampus report
- DAF provider wait times vary

Recommendation: Reporting

Option 1:

Treat DAFpay Gifts Similar to a Pledge:

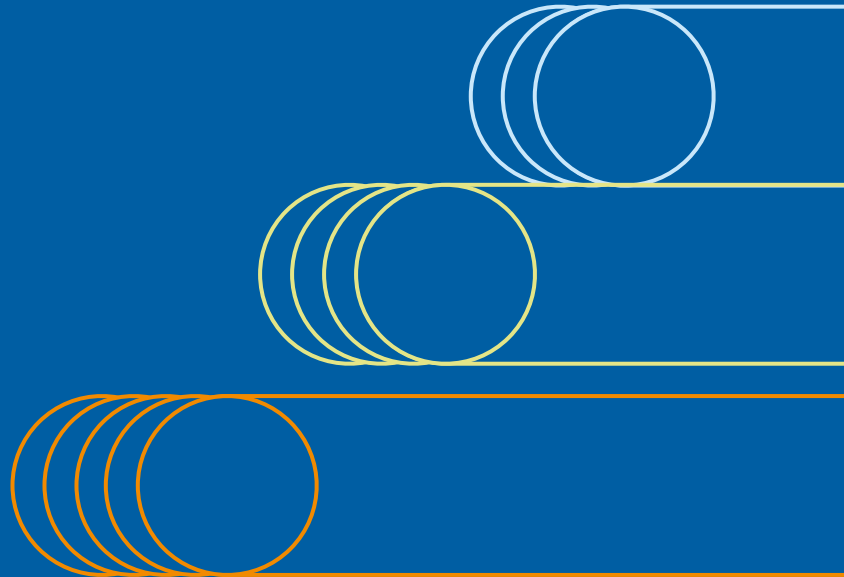
- Receive notice of DAFpay gift and reflect that in CRM ASAP similar to a pledge
 - *This will keep your team up to date on the donor's grant initiation.*
- Acknowledge and steward the donor ASAP
- Update DAFpay gift as 'received' once the grant is received

Option 2:

Don't sync DAFpay gifts to your CRM until you receive the money

**Additional
Questions?**

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Poll Question

When are you planning to activate DAFpay on your giving forms?