



Internal Audit

- ☐ **DAFpay Implementation:** Review all fundraising channels — website, peer-to-peer, events, and mobile apps — to confirm DAFpay is active. See best practices below.
- ☐ **Internal Alignment:** Send an internal memo and/or hold a quick cross-team meeting to align on DAF education, how you accept DAF gifts (both DAFpay and offline) and how DAFs fit into year-end goals.
- ☐ **DAF Pipeline:** Ensure midlevel, major gifts and planned giving teams are actively building their pipeline from DAF gifts coming in through all channels.
- ☐ Add a recurring reminder in your campaign planning calendar to include DAF messaging in year-end outreach.
- ☐ Send a personal thank-you email to new DAF donors. [\[See template\]](#)



Website & Donation Form Best Practices

- ☐ **Button Placement:** Add a DAFpay button above the fold on your DAF “Ways to Give” page (if it’s not already there) and keep your tile lower on the page (Example: [Blood Cancer United](#))
- ☐ If your donation forms don’t include DAFpay at checkout, check if you can embed the button on the same webpage (Example: [B+ Foundation](#))
- ☐ **Menu Visibility:** Include DAFs in your main “Ways to Give” menu and footer links.
- ☐ Check engagement with your “Ways to Give” options, many organizations see outsized engagement with DAF giving and place it higher in the list.
- ☐ **Form Language:** If DAFpay is not directly on your main donate form, make sure to include a linkout to your DAF “Ways to Give” page: “Have a Donor-Advised Fund? You can give here in three clicks.”
- ☐ Hyperlink the words “give here” directly to your DAF or “Ways to Give” page.



GivingTuesday Promotion

- ☐ **Email Outreach:** Send 1-2 emails to known DAF donors — one before and one on GivingTuesday [\[See template\]](#)
- ☐ **Social Posts:** Share ~2 posts focused on DAF giving — one before GivingTuesday and one on the day-of. [\[See template\]](#)
Tip: Mix formats (graphic, short video, quote post). DAFs can be a scroll-stopper if framed as “a smarter way to give.”
- ☐ **Website Updates:** Feature DAFpay on your GivingTuesday landing page & “Ways to Give” page.



Year-End Appeals

- ☐ **DAF Donor Email:** Send a dedicated year-end appeal to known DAF donors with a direct link to Donation forms with DAFpay. [\[Template\]](#)
- ☐ **Mass Email Update:** In your general year-end emails, add a simple templated line like: “Have a Donor-Advised Fund? You can give directly through DAFpay.”
- ☐ **Social Reminders:** Post 1-2 times in mid-December about DAF giving as part of your year-end push [\[See template\]](#)



Donor Stewardship & Messaging

- ☐ **Donor Spotlight:** Feature a DAF donor spotlight in your December content [\[See template\]](#)
- ☐ **Team Training:** Train staff to say: “If you have a Donor-Advised Fund, you can donate directly via our donation forms by checking out with DAFpay.”
- ☐ **Gift Acknowledgement:** Confirm who on the team receives DAFpay gift notifications and that each gift is acknowledged promptly.