Q&A from the chat for Patrice Shumate's 5/13/26 "Uncovering Funds in Hard-to-Reach Places: How DAFs Clue Us In to the Possible Future of Nonprofit Funding" Presentation (plus some useful links)

Amy Nash-Kille: Nonprofits I've been with have often asked whether to consider DAF donations part of "grants" revenue - I have typically said no, that it is different if it doesn't have an application/reporting process. Do folks here agree with that?

- Sarah Holloway: I agree - I usually say if it doesn't have an application process or any reporting requirements it isn't a "grant," but I've been surprised at how many DAFs do have a reporting element that I've been involved with helping to manage/submit.
- Olivia Asato: If a donor name is listed I usually assume our devo manager is recording and filing it. If it is a "fund" or "Foundation" I record and file -- it's a completely imperfect system
- Katie Laughlin: I'd say it depends more on what the DAF calls it. Most we receive call them a grant in the award letter so we default to that. But more to the point I think you are making...we treat them like major donors not foundations.
- Katie Hovde: I do solicit some DAFs, as well as report on some DAFs, and pretty much anything I work on, I have come to the grant line but code the gift type as a DAF
- Amy Nash-Kille: Agreed, if there is reporting I treat it as a grant for tracking purposes. 🙄 And OCF (and others) keep calling those DAF donations "grants" in award letters regardless of process, which causes some confusion for some folks.

Cecilia Lin: How can you get money from DAFs? From their officer? Can you give an example?

- Stephanie Green Weizer: Set up an Oregon Community Foundation profile - I always recommend reaching out to program officer to make sure they know about the org and can direct funds your way.

Cecilia Lin: Can't DAFs be individual? Or it has to under an entity? **(Patrice answered in Q&A)**

Katie Dettman: heard some DAF sponsors aren't allowing folks to donate to the Southern Poverty Law Center

- Katie Laughlin: True, mostly Fidelity, Schwab, Vanguard. etc.

Amy Nash-Kille: The NP Trust has some figures on this - over 1.7 million DAFs out there, average is in the mid $100K range but there is a lot of variability out there (lots with much more, lots with much less).

Holly Van Houten: Does anyone have any experience pitching your charity to local investment advisors say at Fidelity or Schwab? I wonder if that's an avenue to get noticed by a DAF?

- Katie Laughlin: I have found this to not amount to anything. I'd recommend more work with Donor Advisors at community foundations

Katie Laughlin: The impact investing/PRI space is very relevant in the affordable housing development and mission driven lending field.

LaDona Martin: I love the idea of showing up in places where these conversations take place, Patrice. Could you give us some suggestions of effective ways you've found to do this? **(Patrice answered in Q&A)**

Amy Nash-Kille: I've been hearing about donor relationship officer work being outsourced to AI solutions, which I have ethical concerns about since it seems that donors are not being told that they are interacting with technology rather than actual people. (And related AI ethics concerns…) Thoughts on how AI may interact with DAF decision-making in general? **(Patrice answered in Q&A)**

Cecilia Lin: What's the relationship between a wealth advisor and a donor? As a grant person, if I want money, should I go to a sponsored org directly? Can you share some strategy? How to search DAFs? **(Patrice answered in Q&A)**

Useful Links:
Collective Giving: Philanthropy Together: https://philanthropytogether.org/
More Than Grant Writers: https://morethangrantwriters.org/