



## Make the Most of Your Widget

A Tutorial for Nonprofits

### SECTION 1

The concept behind the DAF Direct widget is simple. Provide an easy-to-use application that enables donors with a DAF to initiate a grant recommendation directly from your website.

*So what's the best way to ensure that your organization benefits from this widget?*

We've identified three best practices that have helped some of our early nonprofit adopters make the most of their DAF Direct widget.

*Access live examples of the widget on participating nonprofits' sites.*

[American Red Cross](#)

[Cradles to Crayons](#)

[Charity Navigator](#)

[Pan-Mass Challenge](#)

#### 1. Dedicate space on your website to explain donor-advised funds and the DAF Direct widget

This is important for two reasons. First, it helps ensure a smooth user experience for donors unfamiliar with DAFs or DAF Direct. Second, it ensures that any DAF donor who may be inclined to support your organization is aware that you are committed to making their giving experience as easy as possible. **(For more information, including generic explanatory language for you to use on your site, please see Section 2)**

#### 2. Integrate the DAF Direct widget into your payment flow

Some of the early adopters of DAF Direct found success by integrating the widget directly into their payment flow. This ensures that a DAF donor moving through the traditional donation flow is made aware of the option to recommend a grant with their DAF. This option also tends to create the most seamless donor experience. **(For more information, including instructions and the necessary HTML customization, please see Section 2)**

#### 3. Integrate the DAF Direct widget into email fundraising campaigns

Another early adopter of DAF Direct integrated the widget into an email fundraiser and received a very positive response. This can be especially powerful if you are able to target known DAF donors with your campaign. **(For more information, including instructions and the necessary HTML customization, please see Section 2)**



## SECTION 2

### 1) Dedicate space on your website to explain donor-advised funds and the DAF Direct widget

As a general rule, we have seen nonprofits position a DAF page within a “Ways to Give” type of section on their website. Below is some generic text you can use to describe donor-advised funds.

#### **What is a donor-advised fund?**

A donor-advised fund (DAF) is a type of giving program that allows you to combine the most favorable tax benefits with the flexibility to easily support your favorite charities. An increasingly popular charitable vehicle, DAFs are an excellent way to both simplify your charitable giving and facilitate your strategic philanthropic goals.

#### **How does it work?**

- Establish your DAF by making an irrevocable, tax-deductible donation to a public charity that sponsors a DAF program
- Advise the investment allocation of the donated assets (any investment growth is tax-free)
- Recommend grants to qualified public charities of your choice

#### **What are the main advantages of a donor-advised fund?**

**Simplicity** – The DAF sponsor handles all record-keeping, disbursements, and tax receipts.

**Flexibility** – Timing of your tax deduction can be separate from your charitable decision making.

**Tax-efficiency** – Contributions are tax-deductible and any investment growth in the DAF is tax-free. It is also easy to donate long term appreciated securities, eliminating capital gains taxes and allowing you to support multiple charities from one block of stock.

**Family legacy** – A DAF is a powerful way to build or continue a tradition of family philanthropy.

**No start-up costs** – There is no cost to establish a donor-advised fund. However, there are often minimum initial charitable contributions to establish the DAF (typically \$5,000 or more).\*\*

**No transaction fees** – Once approved, 100% of your recommended grant goes to your qualified public charity of choice.\*\*

**Privacy if desired** – Donors may choose to remain anonymous to the grant recipient.

\*\* Sponsoring organizations generally assess an administrative fee on the assets in a DAF. These fees vary by sponsoring organization.

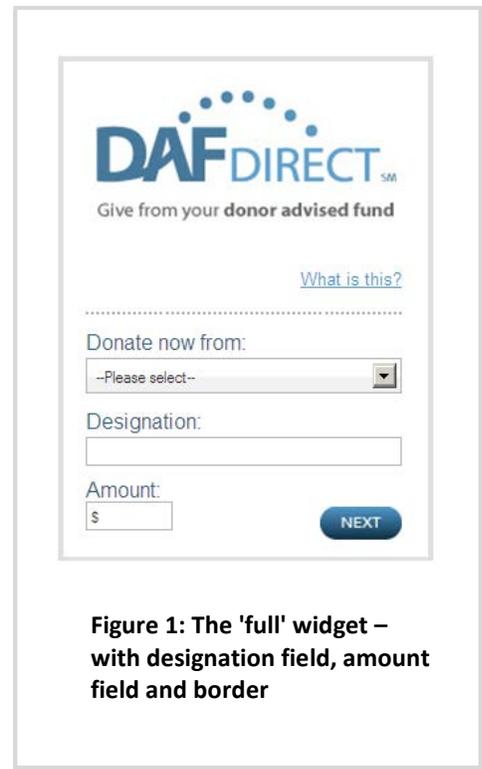
**How it works (Detail):**

- 1) An individual or entity makes an irrevocable contribution to a sponsoring charitable organization to establish a donor-advised fund. This person becomes a donor-advisor.
- 2) The sponsoring organization allocates the charitable contribution to the particular donor-advisor's DAF. The donor-advisor has the opportunity to name the DAF (e.g. The John Doe Fund).
- 3) The donor-advisor retains advisory privileges over the investment allocation for the DAF. Since the assets in the DAF belong to the sponsoring organization, any investment growth is tax free. The investment options available vary by sponsoring organization.
- 4) The donor-advisor has advisory privileges over the disbursements made from the DAF. The disbursements are recommended by the donor-advisor, but must meet the grant making criteria of the sponsoring organization. Typically, disbursements may only be recommended to IRS-qualified public charities exclusively for charitable purposes. Additionally, the donor may not receive any more than incidental benefits as a result of the disbursement.
- 5) Once the sponsoring organization approves the recommended disbursement, the grant is made to the qualified charitable organization.

**2) Integrate the DAF Direct widget into your payment flow**

If you intend to channel all of the donations to your nonprofit through an existing online workflow, you can add DAF Direct as a payment option. The following will explain the recommended approach for this integration. Please note that early adopters of the DAF Direct widget, the Massachusetts Institute of Technology and the Pan Mass Challenge, have already enjoyed success from an integrated approach.

The DAF Direct widget, as shown in Figure 1, is a self-contained workflow. More specifically, it is meant to collect enough information about your nonprofit and the intent of the donor to “jumpstart” a grant recommendation workflow. The donor will then complete the grant recommendation on a website hosted by the sponsoring organization of that particular donor's donor-advised fund (e.g. Fidelity Charitable, Greater Kansas City CF, or Schwab Charitable).



**Figure 1: The 'full' widget – with designation field, amount field and border**



Give from your donor advised fund

The widget will collect your nonprofit’s Tax Identification Number (“TIN”), and it provides the option of recording the recommended grant amount and designation. The amount and designation of the grant recommendation then “hop” to the selected sponsoring organization once the donor clicks “Next”.

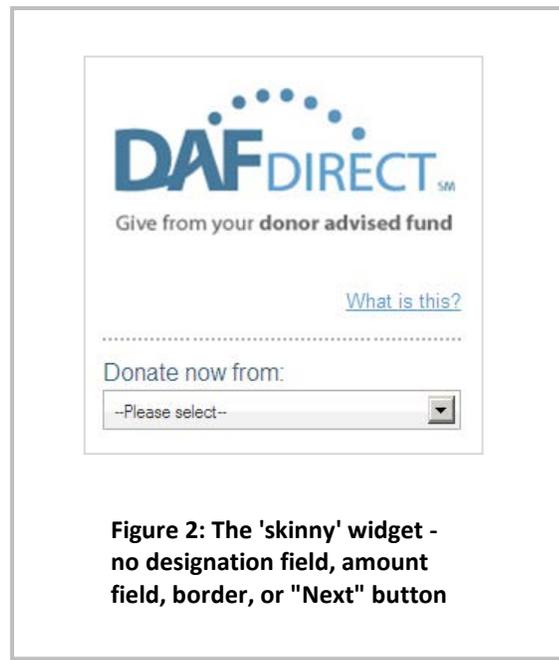
To do so, you have to support, at a minimum, the DAF Direct logo and dropdown of the participating sponsoring organizations as shown in Figure 2 (Note: the border of the widget is removed here though the styles referenced in DAF Direct style sheets are still utilized).

To obtain this reduced widget, you should register and generate a widget with the following options unchecked.

4

Optional items to include:

- Designation field
- Amount field
- Gray border



The following HTML will then be generated to render the reduced widget:

```
<script type = "text/javascript">_dafdirect_settings="XXXXXXXXXX_2000_XXXXXXXXXXXXXXXXXXXXXXXXXXXX"
</script><script type = "text/javascript" src = "http://dafdirect.org/ddirect/dafdirect4.js"></script>
```

Please note that the “NEXT” button will still appear. To hide the “NEXT” button, you must modify the generated HTML code to add ‘\_dafdirect\_hide\_button="yes"’ as shown below:

```
<script type = "text/javascript">_dafdirect_hide_button="yes";_dafdirect_settings="XXXXXXXXXX_2000_XXXXXXXXXXXXXXXXXXXXXXXXXXXX"
</script><script type = "text/javascript" src = "http://dafdirect.org/ddirect/dafdirect4.js"></script>
```

This HTML "snippet" should be placed within your online payment flow in such a way that, upon selecting "DAF Direct" or "Donate with your donor-advised fund" from your list of payment options, the reduced widget should be exposed.



As shown in Figure 3, the [Massachusetts Institute of Technology's giving workflow](#) chooses to expose the DAF Direct widget once a check box is selected:

### 3) Integrate the DAF Direct widget into an email fundraising campaign

The DAF Direct widget can be thought of as a portable digital giving application for your nonprofit. To this end, your HTML-enabled email campaigns can include the DAF Direct widget.

Simply register and generate code for the version of the widget that you wish to display. You can also follow the steps above for a “reduced widget” footprint.

It is recommended that you display the DAF Direct logo and the drop-down of the participating sponsoring organizations within your email.

If you wish to provide a set of targeted hyperlinks within an email campaign (for example “[Click here to provide support with a \\$200 grant from your Fidelity Charitable donor-advised fund](#)”), you can follow the examples below:

(Note that those values in **bold** should be changed to fit your needs)

#### For a Fidelity Charitable donation:

[https://charitablegift.fidelity.com/cgfweb/CGFLogon.cgfdo?Npo\\_Id=\*\*123123123\*\*&Grnt\\_amnt=\*\*200.0\*\*&Grnt\\_Dsg\\_Txt=\*\*Annual Fund\*\*&Device\\_Type=Widget&App\\_Id=MDNR&source=widget](https://charitablegift.fidelity.com/cgfweb/CGFLogon.cgfdo?Npo_Id=<b>123123123</b>&Grnt_amnt=<b>200.0</b>&Grnt_Dsg_Txt=<b>Annual Fund</b>&Device_Type=Widget&App_Id=MDNR&source=widget)

#### For a Schwab Charitable donation:

[https://client.schwab.com/Login/SignOn/CustomerCenterLogin.aspx?SANC=recommendgrant&PARMS=|Npo\\_Id=\*\*123123123\*\*|Grnt\\_Amnt=\*\*200\*\*|Device\\_Type=Widget|App\\_Id=MDNR|source=widget|Grnt\\_Dsg\\_Txt=\*\*Annual Fund\*\*](https://client.schwab.com/Login/SignOn/CustomerCenterLogin.aspx?SANC=recommendgrant&PARMS=|Npo_Id=<b>123123123</b>|Grnt_Amnt=<b>200</b>|Device_Type=Widget|App_Id=MDNR|source=widget|Grnt_Dsg_Txt=<b>Annual Fund</b>)

#### For a Greater Kansas City CF donation:

[https://prodstaging.edonorcentral.com/login\\_0048.asp?Npo\\_Id=\*\*123123123\*\*&Grnt\\_Amnt=\*\*200\*\*&Grnt\\_Dsg\\_Txt=\*\*Annual Fund\*\*](https://prodstaging.edonorcentral.com/login_0048.asp?Npo_Id=<b>123123123</b>&Grnt_Amnt=<b>200</b>&Grnt_Dsg_Txt=<b>Annual Fund</b>)



**Figure 3: The widget in the Massachusetts Institute of Technology's giving workflow**