Advancement Data in DASL Data Entry
June 4, 2024

NAIS DASL

DATA AND ANALYSIS FOR SCHOOL LEADERSHIP

Agenda

DASL Advancement Data Entry 2024-2025

- Benefits of Your DASL Data
- Advancement in DASL
- Frequently asked questions
- Resources and next steps

NAIS and CASE

- Data partnership formed in April 2022

- Collaborated to align Advancement questions in DASL with the CASE Global Reporting Standards with broad input and feedback from schools and associations

- Data accessible to all in DASL – Data and Analysis for School Leadership, largest data repository of independent schools, comprised of over 40 state, regional, and national associations

Benefits of Your Data in DASL

A Few Examples:

TRENDBOOK
2023-2024

National Association
of Independent

NAIS DASL DATA AND ANALYSIS FOR SCHOOL LEADERSHIP

2024 Facts at a Glance
Data Entry Year: 2023-24
Comparison Group: All NAIS Member Schools

Enrollment
School Count
Total Enrollment
Average Enrollment
Median Enrollment

Independent School
Work Forces
THE WORKPLACE ISSUE

Independent School
COLLEGE ADMISSION

PUBLISHED

UNITED STATES COURT OF APPEALS
FOR THE FOURTH CIRCUIT

No. 23-1453

Protecting Nonprofit Status
for Independent Schools

Benefits of Your Data in DASL

- Highlight areas of opportunity for improvement and investment

- Inform strategic planning, set realistic goals and improve goal-setting accuracy

- Measure impact of strategic initiatives over time

- Create your own reports in DASL

- Demonstrate fundraising effectiveness and impact to stakeholders, donors, trustees

Important Dates

2024-2025 Data Collection

- 6/12 - Foundation and DASL|BIIS Financial Operations Open

- 10/18 @ 4pm ET - Foundation soft close, data scrubbing

- 11/22 @ 4pm ET - DASL|BIIS Financial Operations soft close, data scrubbing

NAIS **DASL** | CASE

? HELP

BROWSE REPORTS   CREATE YOUR OWN   MANAGE DATA   ADMIN
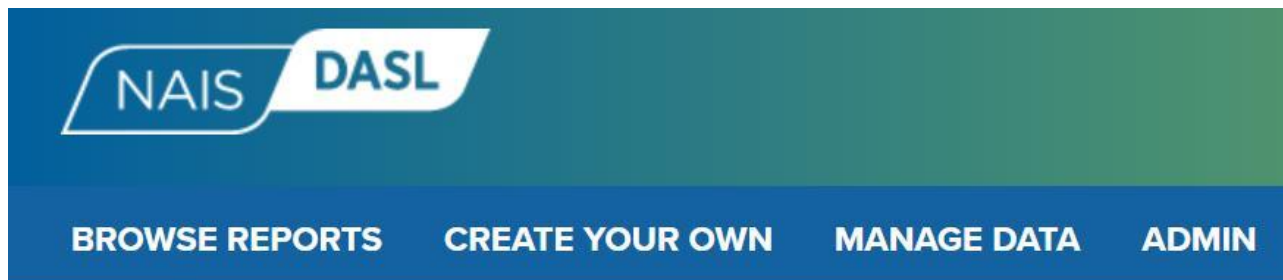
Prepare for 2024-2025 DASL Data Entry

DASL Data Entry Layout for 2024-2025

Data Entry Guide

DASL Data Entry WEBINARS at 1pm ET:
5/2 - Financial Aid Data recording
6/4 - Advancement Data
6/13 - What's New and Welcome to Data Entry
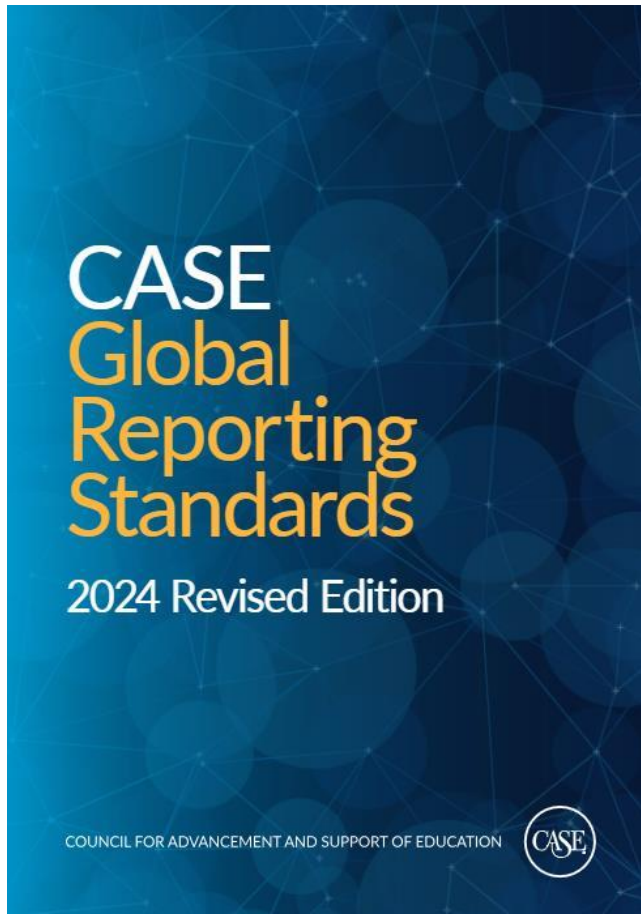8/20 - FAQs and Answers
9/26 - Getting to 100%
10/22 - DASL|BIIS Financial Operations Data

Join the DASL Email List

Sign up to receive DASL email announcements here.

https://confirmsubscription.com/h/j/AEDFF769595F727E

- dasl.nais.org
- Welcome to DASL Data Entry video
- Announcements and resources available on the DASL Home Page
- For resources use HELP menu in upper right corner
- Using DASL Admin – your Head of School or Business Officer can grant you access to DASL

NAIS **DASL**   **DATA AND ANALYSIS FOR SCHOOL LEADERSHIP**

CASE Global Reporting Standards

CASE
Global
Reporting
Standards

2024 Revised Edition

COUNCIL FOR ADVANCEMENT AND SUPPORT OF EDUCATION · CASE

- Provide common foundation

- Guide ethical decisions

- Reflect global perspective

- Ensure transparency and consistency

- Enable benchmarking

*CASE Standards were updated Spring of 2024. Those with digital subscriptions already have access to the updates. **All applicable definitions and instructions needed for data entry, including recent updates, are available in DASL.***

Advancement Subcategories

- Funds Received (previous year)
- Advancement Additional Details (previous year)
  - Additional questions based on Funds Received counting method
- Advancement Activity (previous year)
  - Questions based on New Funds Committed counting method
  - Measures the impact of fundraising efforts

Questions for CASE members in other DASL categories – Advancement Staff, FTE counts, and Advancement Expenditures in Financial Operations

Two Lenses on Fundraising

Funds Received

A measure of money in the bank. Funds Received are monies and property <u>received</u> within the reporting year.

Pledge Payments Received

Realized Bequests/Legacies

Newly Established Irrevocable Planned Gifts (FV)

Outright Gifts (not associated with a pledge)

New Funds Committed

Measures the impact of fundraising efforts. New monies and property <u>committed</u> in the reporting year.

New Pledges or Recurring Gifts

New Bequest/Legacy Intentions (Donors Aged 65+)

Newly Established Irrevocable Planned Gifts (FV)

Outright Gifts (not associated with a pledge)

Constituent Giving

Two broad categories – Individuals and Organizations

Parents/Guardians of Current Students Alumni/ae Grandparents of Current Students Parents and Grandparents of Alumni/ae Employees Other Individuals	Corporations Foundations Donor-Advised Funds Other Organizations

- Individual donors can fall into more than one category
- **NO Hierarchy** - donors and dollars may be counted in multiple categories
- Hard credit and soft credit provide a full picture of giving

Goal for Data Collection

- GOAL – to capture the number of donors in each constituent <u>row</u> who "gave or influenced the giving" and the total dollars the constituents "gave or influenced"

- Across each row, the total represents the total donors and total dollars for that constituent type

- Donors are counted at the individual level and dollars are counted at the household level

Constituent Giving

Number of Donors (based on Funds Received)

	Legally Contactable	Hard Credit Donors	Soft Credit Donors	Total (calculated)	% Participation (calculated)
Parents/Guardians of Current Students	123456	123456	123456		%
Alumni/ae	123456	123456	123456		%
Grandparents of Current Students	123456	123456	123456		%
Parents and Grandparents of Alumni/ae	123456	123456	123456		%
Employees	123456	123456	123456		%
Other Individuals		123456	123456		
Corporations		123456			
Foundations		123456			
Donor-Advised Funds		123456			
Other Organizations		123456			
Non-attributable/Other		123456			

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Constituent Giving

- **Hard credit** is legal credit. Enter the donor or value of funds received that were legally credited to the individual or entity.

- **Soft credit** is for recognition purposes. It is provided to allow you to capture donors and giving in a constituent category that was <u>not already counted</u> in hard credit for that constituent type. For individual donor sources, soft credit can be used to count donors and funds received by another entity but recorded for recognition purposes to the individual.

Constituent Giving

Frequently Asked Questions

- How do I count donor-advised funds?
  - Donor-advised fund sponsors, such as Fidelity Charitable, count as ONE hard credit donor even if the distribution payment was for multiple individuals

- Where do I count matching gifts?
  - Matching gifts from corporations are counted as hard credit in Corporations

- Where do I count fundraising consortia (ie: United Way, Benevity)?
  - Count fundraising consortia as hard credit in Other Organizations

Advancement Activity

New Funds Committed

- All questions in Advancement Activity use New Funds Committed as a counting method.

- Measures the impact of fundraising efforts.

- New monies and property <u>committed</u> in the reporting year.

Advancement Activity

New Funds Committed

- **Outright gifts**
  - Contributions received in the reporting year
  - Include newly established irrevocable deferred gifts
  - Do NOT include pledge payments

- **Pledges**
  - Count pledges that were secured in the reporting year
  - Count the <u>full value of the pledge</u>
  - Count pledges made in the reporting year even if they were partially or fully paid this year
  - **Bequest intentions** – documented bequests/legacy intentions counted at face value for donors 65 years of age or older

Additional Resources

- Advancement definitions and instructions in DASL

- Advancement Webinar Series, Spring 2023

  - Detailed examples of data entry scenarios for constituent giving and new funds committed

  - Considerations for preparing and pulling data for data entry

  - https://www.nais.org/analyze/data-and-analysis-for-school-leadership-(dasl)/about-dasl/nais-webinar-series-dasl-advancement-data/

Advancement Data Checks

- Data collected are designed to work together as a complete set. It is essential for validating data.

- Examples

  - Funds received – Total Dollars = Funds Received by Purpose = Funds Received by Gift Bands (CASE member question)

  - Legally contactable must be greater than or equal to number of donors, critical to calculate participation

  - Trustees – number of trustee donors cannot be greater than the number of trustees

Thank you!

- DASL Homepage – dasl.nais.org
- Contact us:
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