

# DASL Data Entry 2023-2024: Measuring the Impact of Fundraising Efforts

June 6, 2023



# Agenda

- DASL Advancement Data Entry 2023-2024
- Funds Received vs New Funds Committed
  - Definitions
  - Data entry
  - Preparing for data entry
- Resources and next steps

# NAIS and CASE

- NAIS and CASE Data Partnership formed April 2022
- DASL – Data and Analysis for School Leadership, NAIS’ platform
- NAIS’ DASL Data are accessible to 40+ State, Regional and National Independent School Associations
- Collaborative process to align advancement questions to the CASE Global Reporting Standards
- All Questions vetted with broad input and feedback from schools and associations
- **Introducing CASE Insights!** – the new name for the data, standards, and research provided by CASE

# CASE Global Reporting Standards



- **Provide** common foundation
- **Guide** ethical decisions
- **Reflect** global perspective
- **Ensure** transparency and consistency
- **Enable** benchmarking

*All applicable definitions and instructions needed for data entry are available in DASL.*

# Advancement Core Overview

- Funds Received (Previous Year)
  - \$, Donors, Constituent Giving, Realized Bequests, Trustee Giving
- Advancement Additional Details (Previous Year)
  - Gift Purpose, Largest Donors, Campaign
- **NEW** Advancement Activity (Previous Year)
  - **New Funds Committed**
  - **CASE Member only Constituent Giving**

# What do I include?

- Include all philanthropic giving (within the Funds Received and New Funds Committed definitions)
- Do not separate by annual fund and campaign

“Educational philanthropy is the **voluntary** act of providing **private** financial support to nonprofit educational institutions. To be categorized as philanthropy in keeping with CASE standards, such financial support must be provided for the **sole purpose of benefiting the institution’s mission** and its social impact, **without the expressed or implied expectation** that the donor will **receive anything more than recognition and stewardship** as the result of such support.”

*--CASE Global Reporting Standards, Edition*

# Two Lenses on Fundraising

## Funds Received

A measure of money in the bank.

Funds Received are monies and property received 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 committed in the reporting year.

New Pledges or Recurring Gifts Up to 5 yrs.

New Bequest/Legacy Intentions (Donors Aged 65+)

Newly Established Irrevocable Planned Gifts (FV)

Outright Gifts (not associated with a pledge)

# Outright Gifts

New Pledges or Recurring Gifts Up to 5 yrs.

New Bequest/Legacy Intentions (Donors Aged 65+)

Newly Established Irrevocable Planned Gifts (FV)

Outright Gifts (not associated with a pledge)

- **Outright gifts** are contributions received in the reporting year that are not associated with a pledge (no prior year or current year pledge tied to this donation).
  - **Examples:** annual fund appeals, newly established irrevocable deferred gifts
- Do NOT include pledge payments.



# Irrevocable Planned Gifts

New Pledges or Recurring Gifts Up to 5 yrs.

New Bequest/Legacy Intentions (Donors Aged 65+)

Newly Established Irrevocable Planned Gifts (FV)

Outright Gifts (not associated with a pledge)

- **Irrevocable planned gifts** provide for the future health of an organization
  - **Examples:** Charitable gift annuities, charitable remainder trusts, pooled income funds, remainder interest in property
- Count at face value
- Count with Outright Gifts in DASL

# Pledges

New Pledges or Recurring Gifts Up to 5 yrs.

New Bequest/Legacy Intentions (Donors Aged 65+)

Newly Established Irrevocable Planned Gifts (FV)

Outright Gifts (not associated with a pledge)

- **A pledge** is a commitment to make future gifts
- **Who can make a pledge?**
  - The entity with legal control over the assets to be given
- **What can NOT be part of an individual donor's pledge?**
  - Anticipated matching contributions (from employer or other source)
  - Funds coming from a donor-advised fund or community foundation

# How Are Pledges Counted?

## New Funds Committed

**Oral pledges:** Count oral pledges made through a telethon/phonathon campaign, where some form of confirmation is sent to the donor.

**Written pledges:** Count in the year documentation is received. Documentation should specify the amount the donor will pay and the time schedule.

## Funds Received

Count when payment is received.

# Pledges in New Funds Committed

- Count pledges that were secured in the reporting year
- Count the value for up to five years duration from the date of the pledge
- Count pledges made in the reporting year even if they were partially or fully paid this year

***Any funds received against the pledge are counted as Funds Received in the year that each payment is received.***

# Bequests/ Legacy Intentions

New Pledges or Recurring Gifts Up to 5 yrs.

New Bequest/Legacy Intentions  
(Donors Aged 65+)

Newly Established Irrevocable  
Planned Gifts (FV)

Outright Gifts (not associated with a  
pledge)

- **Bequests/legacy intentions** are provisions in a will, trust, or other testamentary legal document providing a gift to charity pursuant to applicable law.
- **When can you count a bequest intention?**
  - When you have a basis for valuation (using % of donor's estate, specific amount, or residual amount)
  - When the donor is 65 years or older during the reporting year

# How Are Bequests/ Legacy Intentions Counted?

## New Funds Committed\*

Documented bequests/ legacy intentions are counted at face value **as long as the donor is 65 years of age or older.**

## Funds Received

Gift value and appreciation of value are counted when a bequest/ legacy intention is realized.

*\*In DASL Advancement, a breakout is provided for bequest intentions in the total New Funds Committed question. Additional questions in Advancement Activity exclude bequest intentions.*

# New Funds Committed in DASL

	Donor Count <span>?</span> <span>N/A</span>	\$ Committed <span>?</span> <span>N/A</span>
New Pledges <span>?</span> <span>N/A</span>	123456 <span>N/A</span>	\$ 123456789 <span>N/A</span>
Outright Gifts (not associated with a pledge) <span>?</span> <span>N/A</span>	123456 <span>N/A</span>	\$ 123456789 <span>N/A</span>
New Revocable Bequest Intentions <span>?</span> <span>N/A</span>	123456 <span>N/A</span>	\$ 123456789 <span>N/A</span>
Total New Funds Committed (without bequests) <span>?</span>		\$ <input type="text"/>
Total New Funds Committed (including bequests) <span>?</span>		\$ <input type="text"/>

# Trustee New Funds Committed

	Trustee Commitments Hard Credit ? NA	Trustee Commitments Soft Credit ? NA	Total ?
\$ Committed ? NA	\$ 123456789 NA	\$ 123456789 NA	\$ NA
Donor Count ? NA	123456 NA	123456 NA	NA

- Trustee: An individual person or member of a board given control or powers of administration of property in trust with a legal obligation to administer it solely for the purposes specified
- New Funds Committed in this question includes New Pledges + Outright Gifts
- Do NOT include bequest intentions



# CASE Member Only Questions

- New Funds Committed – Dollars & Donors
  - Constituent giving (parents, alumni, etc.) using new funds committed definition
  - ***No hierarchy*** use soft credit to capture donors and donations not already counted in hard credit
- New Funds Committed – Purpose

# Frequently Asked Questions

- What is a *new* pledge?
  - A new pledge is one that was recorded for the first time in this reporting year.
- Do we count pledges for annual giving?
  - Yes, all gift commitments, of any size or to any fund/ purpose, are counted as a pledge in New Funds Committed
- What if I have a pledge and a payment against that pledge in the same year?
  - The pledge payment is counted in Funds Received
  - The pledge (5 years of the value) is counted in New Funds Committed
  - Do NOT count pledge payments in New Funds Committed

# Preparing for Data Entry

- Consider your record keeping practices
  - Do you have consistent policies and practices on how to record pledges and bequest intentions?
  - CASE Standards can help you develop best practices
- Consider your CRM/ database system – How are you recording and identifying pledges and payments against those pledges? Bequest intentions?
- Reports – Can you edit the underlying gift types being pulled?
- Query/Exports
  - More flexibility for editing the population of donors and gifts you want to include
  - Ability to manipulate the data

# Pulling Data for Data Entry

Example from a donor transaction/record perspective

Date of Transaction	Amount	Gift Type Code*	Description	New Funds Committed	Funds Received
2023	\$100	G	Gift to annual giving appeal	\$100	\$100
2023	\$5,000	P	Pledge for \$5,000 over 5 years	\$5,000	
2023	\$1,000	PP	Pledge payment		\$1,000
2024	\$1,000	PP	Pledge payment		
2025	\$1,000	PP	Pledge payment		
2026	\$1,000	PP	Pledge payment		
2027	\$1,000	PP	Pledge payment		

*\*Example of gift type code for illustration purposes only.*

# Community Support

- NAIS Connect / Development Community – great place to post questions to your peers and suggestions/solutions
- [www.nais.org](http://www.nais.org) > Participate > NAIS Connect for NAIS Members only
- DASL Homepage – [dasl.nais.org](http://dasl.nais.org)
- Contact us at [insights@case.org](mailto:insights@case.org) or [daslhelp@nais.org](mailto:daslhelp@nais.org)

## 2023-2024 Data Collection – Important Dates

- June 14th – Data Entry Opens for DASL Foundation Data and DASL|BIIS Financial Operations for schools
- October 13th – DASL Foundation Data entry closed for scrubbing
- November 15th – DASL Foundation Data cleaned and released for reporting
- November 17<sup>th</sup> - DASL|BIIS Financial Operations Data – closed for scrubbing

# Additional Resources

## Webinar Series Recordings

[https://www.nais.org/analyze/data-and-analysis-for-school-leadership-\(dasl\)/about-dasl/dasl-data-entry-webinars/#recordings](https://www.nais.org/analyze/data-and-analysis-for-school-leadership-(dasl)/about-dasl/dasl-data-entry-webinars/#recordings)

Webinar #1: Overview of Advancement Data

Webinar #2: Constituent Giving – Hard and Soft Credits

This presentation will also be posted to the DASL webinar link, and you will receive a link to the recording.

# Thank you!

- DASL Homepage – [dasl.nais.org](https://dasl.nais.org)
- Contact us at [insights@case.org](mailto:insights@case.org) or [daslhelp@nais.org](mailto:daslhelp@nais.org)

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