

DASL Data Entry 2023-2024: Constituent Giving – Hard and Soft Credits

May 11, 2023



Agenda

- DASL Advancement Data Entry 2023-2024
- Constituent Giving
 - Overview
 - Key definitions
 - Data entry examples
 - 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

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)

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, 1st Edition

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**

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

Dollars Received

(Funds Received)

	\$ Hard Credit ? NA	\$ Soft Credit ? NA	Total (calculated) ?
Parents/Guardians of Current Students ? NA	\$ 123456789 NA	\$ 123456789 NA	\$
Alumni/ae ? NA	\$ 123456789 NA	\$ 123456789 NA	\$
Grandparents of Current Students ? NA	\$ 123456789 NA	\$ 123456789 NA	\$
Parents and Grandparents of Alumni/ae ? NA	\$ 123456789 NA	\$ 123456789 NA	\$
Employees ? NA	\$ 123456789 NA	\$ 123456789 NA	\$
Other Individuals ? NA	\$ 123456789 NA	\$ 123456789 NA	\$
Corporations ? NA	\$ 123456789 NA		
Foundations ? NA	\$ 123456789 NA		
Donor-Advised Funds ? NA	\$ 123456789 NA		
Other Organizations ? NA	\$ 123456789 NA		
Non-attributable/Other ? NA	\$ 123456789 NA		

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 ? %	<input type="text"/>	<input type="text"/> %
Alumni/ae ? %	123456 ? %	123456 ? %	123456 ? %	<input type="text"/>	<input type="text"/> %
Grandparents of Current Students ? %	123456 ? %	123456 ? %	123456 ? %	<input type="text"/>	<input type="text"/> %
Parents and Grandparents of Alumni/ae ? %	123456 ? %	123456 ? %	123456 ? %	<input type="text"/>	<input type="text"/> %
Employees ? %	123456 ? %	123456 ? %	123456 ? %	<input type="text"/>	<input type="text"/> %
Other Individuals ? %		123456 ? %	123456 ? %	<input type="text"/>	
Corporations ? %		123456 ? %			
Foundations ? %		123456 ? %			
Donor-Advised Funds ? %		123456 ? %			
Other Organizations ? %		123456 ? %			
Non-attributable/Other ? %		123456 ? %			

Legally Contactable

- Criteria: you have **at least one means of contact** (phone, mail address, or email address), the individual is not deceased and does not have a total “no contact” status.
- If the individual only opted out of fundraising communications, they are still counted as legally contactable.
- Two parents = **TWO** contactable individuals
- A social media contact (Twitter, Facebook, Instagram) without another method of contact is not sufficient to make someone contactable.

	Legally Contactable ?
Parents/Guardians of Current Students	123456
Alumni/ae	123456
Grandparents of Current Students	123456
Parents and Grandparents of Alumni/ae	123456
Employees	123456

Hard Credit and Soft Credit

- **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 not already counted 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.

Goal for Data Collection

- GOAL – to capture the number of donors in each constituent row 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

Dollars Received

	\$ Hard Credit ? NA	\$ Soft Credit ? NA	Total (calculated) ?
Parents/Guardians of Current Students ? NA	\$ 123456789 ? NA	\$ 123456789 ? NA	\$ [] ?

Number of Donors

	Legally Contactable ? NA	Hard Credit Donors ? NA	Soft Credit Donors ? NA	Total (calculated) ?	% Participation (calculated) ?
Parents/Guardians of Current Students ? NA	123456 ? NA	123456 ? NA	123456 ? NA	[] ?	[] %

Example 1

- Parents – Spouse #1 makes a gift of \$100 – how to count donors and dollars for the gift and soft credit to Spouse #2?
- GOAL – capture total donors who “gave or influenced the giving” and the total amount those constituents “gave or influenced”
- Donors are counted at the individual level and dollars are counted at the household level

Dollars Received

	\$ Hard Credit ? %	\$ Soft Credit ? %	Total (calculated) ?
Parents/Guardians of Current Students	\$ 100	\$ 0	\$ 100

Number of Donors

	Legally Contactable ? %	Hard Credit Donors ? %	Soft Credit Donors ? %	Total (calculated) ?	% Participation (calculated) ?
Parents/Guardians of Current Students	2	1	1	2	100.0 %

Example 2 (Dollars)

- Alumni/ae + Donor-Advised Fund – An alumnus/na used their foundation to contribute \$10,000
- GOAL – capture total donors who “gave or influenced the giving” and the total amount those constituents “gave or influenced”

	\$ Hard Credit ? NA	\$ Soft Credit ? NA	Total (calculated) ?
Parents/Guardians of Current Students	\$ 123456789	\$ 123456789	\$
Alumni/ae	\$ 0	\$ 10,000	\$ 10,000
Grandparents of Current Students	\$ 123456789	\$ 123456789	\$
Parents and Grandparents of Alumni/ae	\$ 123456789	\$ 123456789	\$
Employees	\$ 123456789	\$ 123456789	\$
Other Individuals	\$ 123456789	\$ 123456789	\$
Corporations	\$ 123456789		
Foundations	\$ 10,000		
Donor-Advised Funds	\$ 123456789		
Other Organizations	\$ 123456789		
Non-attributable/Other	\$ 123456789		

Example 2 (Donors)

- Alumni/ae + Donor-Advised Fund – An alumnus/na used their foundation to contribute \$10,000
- GOAL – capture total donors who “gave or influenced the giving” and the total amount those constituents “gave or influenced”

	Legally Contactable ?	Hard Credit Donors ?	Soft Credit Donors ?	Total (calculated) ?	% Participation (calculated) ?
Parents/Guardians of Current Students	123456	123456	123456		%
Alumni/ae	1	0	1	1	100.0 %
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		1			
Donor-Advised Funds					
Other Organizations		123456			
Non-attributable/Other		123456			

Example 3 (Dollars)

- Parents + Donor-Advised Fund – Parents contribute \$100 directly AND give \$1,000 through their donor-advised fund
- GOAL – capture total donors who “gave or influenced the giving” and the total amount those constituents “gave or influenced”

	\$ Hard Credit ? NA	\$ Soft Credit ? NA	Total (calculated) ?
Parents/Guardians of Current Students	\$ 100	\$ 1,000	\$ 1,100
Alumni/ae	\$ 123456789	\$ 123456789	\$
Grandparents of Current Students	\$ 123456789	\$ 123456789	\$
Parents and Grandparents of Alumni/ae	\$ 123456789	\$ 123456789	\$
Employees	\$ 123456789	\$ 123456789	\$
Other Individuals	\$ 123456789	\$ 123456789	\$
Corporations	\$ 123456789		
Foundations	\$ 123456789		
Donor-Advised Funds	\$ 1,000		
Other Organizations	\$ 123456789		
Non-attributable/Other	\$ 123456789		

Dollars counted at household level

Example 3 (Donors)

- 2 Parents + Donor-Advised Fund – Parents contribute \$100 directly AND give \$1,000 through their donor-advised fund
- GOAL – capture total donors who “gave or influenced the giving” and the total amount those constituents “gave or influenced”

	Legally Contactable ?	Hard Credit Donors ?	Soft Credit Donors ?	Total (calculated) ?	% Participation (calculated) ?
Parents/Guardians of Current Students	2	1	1	2	100.0 %
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		1			
Other Organizations		123456			
Non-attributable/Other		123456			

Frequently Asked Questions

- Donor-advised funds (ie: Fidelity Charitable) count as ONE donor even if the distribution payment was for multiple individuals
- Matching gifts from corporations are counted as hard credit in Corporations
- Fundraising Consortia (ie: United Way, Benevity) count as hard credit in Other Organizations
- In all examples above, if you have the individual donor information, use soft credit for recognition

Preparing for Data Entry

- Consider your record keeping practices
 - Do you have consistent policies and practices on how to record giving in your CRM?
 - CASE Standards can help you develop best practices
- Consider your CRM/database system
 - How are you recording and identifying constituent type?
 - How do you record hard and soft credit?
 - Are reports in your system using a hierarchy for constituent type?
- What is unique about your data?

Pulling Data for Data Entry

- Reports – Can you edit the underlying population being pulled?
 - It may be easier to use a query/export function to manipulate the data
- Query – Identify the broad population of donors and gifts you are including
 - Funds received – outright gifts, realized bequests, pledge payment gift types
 - All constituent types who made a gift this year
 - Include hard credit and soft credit

Pulling Data for Data Entry

- Export – select fields that you can use to sort, categorize, and de-dupe within constituent type
 - Constituent type
 - Hard credit, soft credit
 - Gift type – gift, pledge payment, realized bequest
 - Soft credit recipient type
 - Summary fields – fields that calculate totals
- Use this to de-dupe counts and totals by constituent type

Community Support

- NAIS Connect / Development Community – great place to post questions to your peers and suggestions/solutions
- www.nais.org > Participate > NAIS Connect for NAIS Members only
- DASL Homepage – dasl.nais.org
- Contact us at insights@case.org or 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 17th - DASL|BIIS Financial Operations Data – closed for scrubbing

Webinars DASL Advancement

Tuesday, June 6, 2023; 3:00–3:45 ET

Measuring Impact of Fundraising Efforts (New Funds Committed)

REGISTER Here:

<https://nais.zoom.us/meeting/register/tJAtf-iqrjgsG9xs2Rxr4HntK6EcEVDJ5GuM>

Recording of Webinar #1: Overview of Advancement Data

[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)

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

Thank you!

- DASL Homepage – dasl.nais.org
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