

DASL Data Entry Workshop Series

DASL Data Entry Workshop on Advancement Data

Presented by:

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August 20, 2025

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Agenda

- Welcome & Introductions
- Benefits of Your Data in DASL
- Case Global Standards & Definitions
- Review
 - Funds Received
 - Additional Advancement Data
 - Advancement Activity
- Enter Advancement Data
- Breakout Groups For Troubleshooting
- Short Survey About Workshop

Hello! We are...

NAIS

- Joy Bodycomb
Senior Director of Data Quality and Integration, DASL
- Andy Kurtz
Data Integrity Specialist, DASL

CASE

- Deborah Trumble
Senior Director, Research, Insights
- Emma Sonduck
Senior Data Strategist

Participant Poll

What is your level of experience/comfort with DASL?

- Clueless about DASL entry
- Have a minor clue about DASL entry
- Pretty OK with DASL
- DASL Savvy
- DASL Rock Star

What Advancement data system does your school primarily use?

- Raiser's Edge (Blackbaud)
- Veracross
- Salesforce
- Little Green Light
- Excel
- Other

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NAIS and CASE

- NAIS DASL collects data for over 45 state, regional, and national associations
- 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
- NAIS DASL provides robust reporting and benchmarking tools which are available to all who enter data in DASL

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 reports in DASL for your school, colleagues and Board
- Demonstrate fundraising effectiveness and impact to stakeholders, donors, trustees

Additional Benefits of Your Data In DASL



na
is | DASL
Data and Analysis for School Leadership

2025 Facts at a Glance
Data Entry Year: 2024-25
Comparison Group: Assoc-CASE



CASE InsightsSM
data | standards | research

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Protecting Nonprofit Status
for Independent Schools

Important Antitrust Policy Reminder

Federal and state antitrust laws are designed to **protect competition**. NAIS complies with antitrust laws and supports competition through its commitment to the **independence, innovation, and diversity** of schools.

NAIS members are each expected to make **independent decisions** as to the policies and practices that govern their individual organizations.

In order to avoid even the appearance of improper coordination between competitors, please comply with the following:

- Do not discuss the details of institution-specific, competitively sensitive information (such as prospective rates/dollar amounts, increases/decreases, or calculations regarding tuition, financial aid, or staff compensation/benefits) with other institutions
- Do not attempt to reach an agreement (whether express or implied) with other institutions about whether, where and how you will compete to attract students, teachers and staff.

Basics about Your DASL Data Entry

Activate Data Entry – must be done by the Head of School or Business Officer

Watch the Welcome to Data Entry 2025–2026 video <https://youtu.be/0alfTmm5lds>

If you do not currently have access to your DASL entry online **Download the data entry layout**

DASL Core https://dasl.nais.org/SharedFiles/Help/Core_DASL_Changes_2025_2026.xlsx?v=2

CASE-specific <https://www.case.org/research/surveys/case-insights-philanthropy-independent-schools-united-states>

These downloads **will NOT include other** state/regional/national **association DASL questions**

If you see **NOT FOR IMPORT** on the top of your workbook pages you can easily **copy and “paste as text”** data into online DASL or the Export Template.

Table of Contents

Enter Data

Review Data

Check Data Quality

Finalize

Enter Data for

60
days

Entry Started

Monday, August
11, 2025

Entry Ends

Friday, October
17, 2025

Data Entry Questions

School 24 / 31	<div></div>
Students 0 / 173	<div></div>
Admission and Attrition 0 / 66	<div></div>
Tuition and Fees 0 / 332	<div></div>
Learning and Teaching 3 / 45	<div></div>
Financial Aid 2 / 107	<div></div>
Advancement 0 / 84	<div></div>
Employee and Board Information 0 / 145	<div></div>

Navigation in Online DASL Entry



DASL

The screenshot shows the DASL Data Foundation interface. At the top is a dark blue navigation bar with the 'naais' logo and 'DASL' text on the left. To the right of the logo are four menu items: 'BROWSE REPORTS', 'CREATE YOUR OWN', 'MANAGE DATA' (which is underlined in yellow), and 'ADMIN'. Below the navigation bar, the page title 'Data Entry 2025-26' is displayed. Underneath this is the 'DASL Data Foundation' header with a link 'Back to Data Collection Home'. A horizontal progress bar follows, with five steps: 'Table of Contents', 'Enter Data' (highlighted in blue), 'Review Data', 'Check Data Quality', and 'Finalize'. Below the progress bar, there are two dropdown menus: 'Category' with 'Advancement' selected, and 'Subcategory' with 'Funds Received (Previous Year)' selected. A yellow arrow points to the 'Subcategory' dropdown. At the bottom, there are three buttons: 'POPULATE WITH LAST YEAR'S DATA' (with a refresh icon), 'HIDE FIELD NOTES' (with a document icon), and 'HIGHLIGHT MISSING DATA' (with a warning triangle icon and underlined in yellow).

Entering DASL Data Online

i INSTRUCTIONS

- Enter total funds received and the number of individuals or entities who donated those funds.
- Funds Received are monies and property received within the reporting year from any individual or qualified organization. This includes outright gifts, payments received to fulfill pledges made in the current or previous years, irrevocable planned gifts at face value, and funds received from realized bequests/legacies.
- Include all gifts including cash, checks, credit cards, virtual currency, stocks, and gifts-in-kind at the face, or fair market, value.
- Enter "0" if the value is zero.
- Do not leave any fields blank.

Total <small>NA</small>	
Total \$ Donated <small>?</small> <small>NA</small>	\$ <input type="text" value="123456789"/> <small>NA</small>
Total Donor Count <small>?</small> <small>NA</small>	<input type="text" value="123456"/> <small>NA</small>

NOT FOR IMPORT

Blank Data File

This Excel workbook contains multiple worksheets, one for each subcategory in the data collection. E the bottom. There are a total of 39 worksheets, so be sure to scroll to the right to access all of the data collection.

This workbook is not a template of the DASL data collection and is not to be used for import.

School

[School Characteristics](#)

[School Facilities](#)

Students

[Enrollment on Opening Day](#)

[Student Diversity](#)

Admission and Attrition

[Admission \(Previous Year\)](#)

[Attrition \(Previous Year\)](#)

Tuition and Fees

[Tuition and Fees](#)

Learning and Teaching

[Class Size/Teaching Load by Division](#)

[Programs](#)

[Schedules and Records](#)

Financial Aid

[Financial Aid Overview](#)

[Need-Based Financial Aid](#)

Advancement

[Funds Received \(Previous Year\)](#)

[Advancement Additional Details \(Previous Year\)](#)

[Advancement Activity \(Previous Year\)](#)

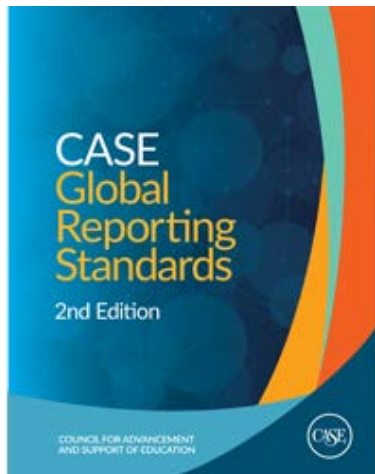
Employee and Board Information

DASL Data Layout or Import Workbook

Funds Received (Previous Year)			
Totals			
	Total		
Total \$ Donated	14458		
Total Donor Count	14459		
Dollars Received			
	\$ Hard Credit	\$ Soft Credit	Total (c)
Parents/Guardians of Current Students	14460	14471	14471
Alumni/ae	14461	14472	14748
Grandparents of Current Students	14462	14473	14749
Parents and Grandparents of Alumni/ae	14463	14474	14750
Employees	14464	14475	14751
Other Individuals	14465	14476	14752
Corporations	14466		
Foundations	14467		
Donor-Advised Funds	14468		
Other Organizations	14469		
Non-attributable/Other	14470		
Number of Donors			

Soft Credit is for recognition purposes. For individual donor sources, soft credit can be used to count funds received that were legally given by another entity but recorded for recognition purposes to the individual.

Why the CASE Global Reporting Standards Matter



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

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

New Bequest/Legacy Intentions (Donors Aged 65+)

Newly Established Irrevocable Planned Gifts (FV)

Outright Gifts (not associated with a pledge)

Hard Credit & Soft Credit



DASL

Hard Credit is legal credit.

Enter the value of funds received that were legally credited to the individual or entity.

Soft Credit is for recognition purposes.

Used to count funds received that were **legally given by another entity** but recorded for recognition purposes to the individual.

Example

If a current parent donates via a donor-advised fund, the gift is hard credited to the DAF (the legal donor) and soft credited to the parent (for recognition).

Hard/Soft Credit Data Entry

Current parents Sam and Susie Smith made a gift of \$5,000 through their DAF, The Smith Family Fund.

	\$ Hard Credit	\$ Soft Credit	Total (calculated)
Parents/Guardians of Current Students	\$ 123456789	\$ 123456789	\$
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	\$ 123456789		
Other Organizations	\$ 123456789		
Non-attributable/Other	\$ 123456789		

	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			

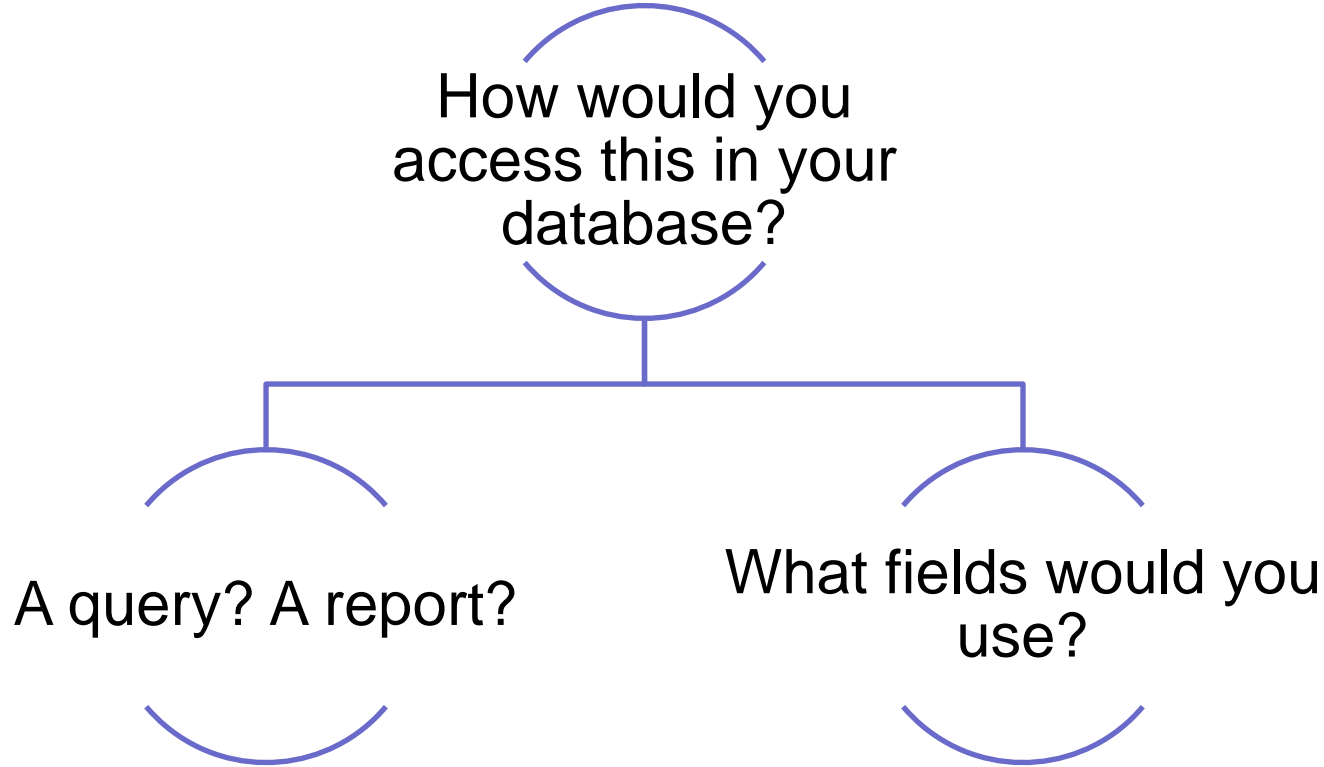
Difference in Dollar and Donor Counting

Count dollars at the household level and donors at the individual level.

Jason and Jane Jones, current parents,
make a gift of \$100

Dollars Received: record as \$100 hard
credit under Parents/Guardians of Current
Students

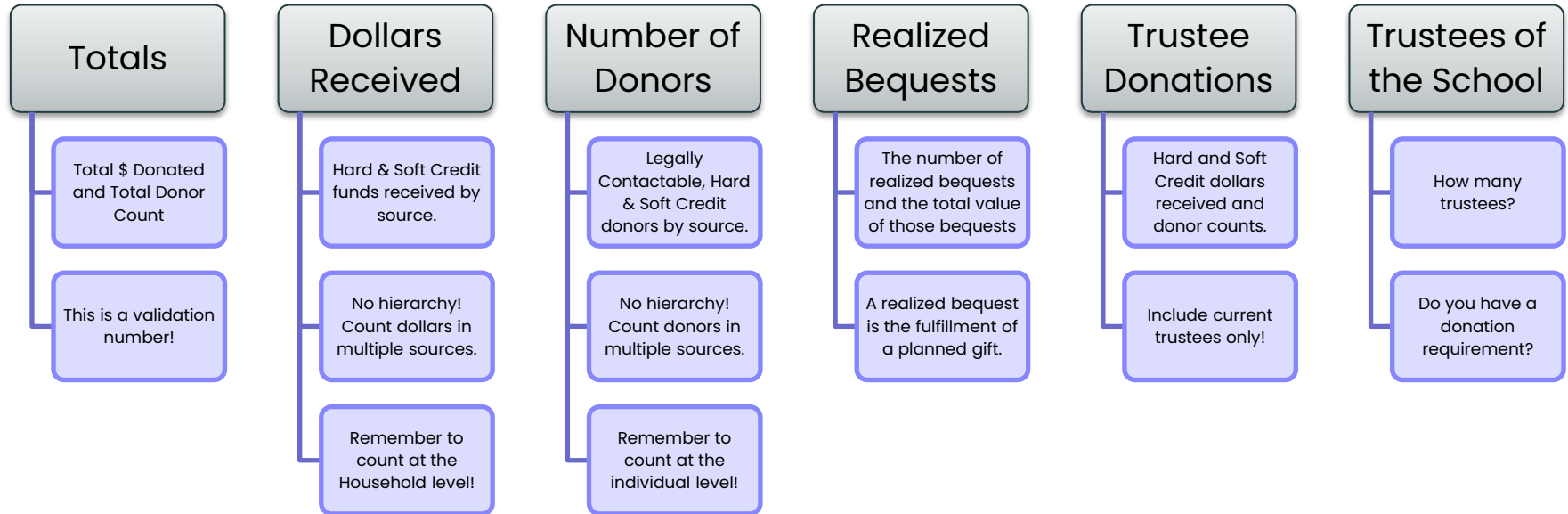
Number of Donors: record as 1 hard credit
and 1 soft credit under Parents/Guardians
of Current Students



Funds Received



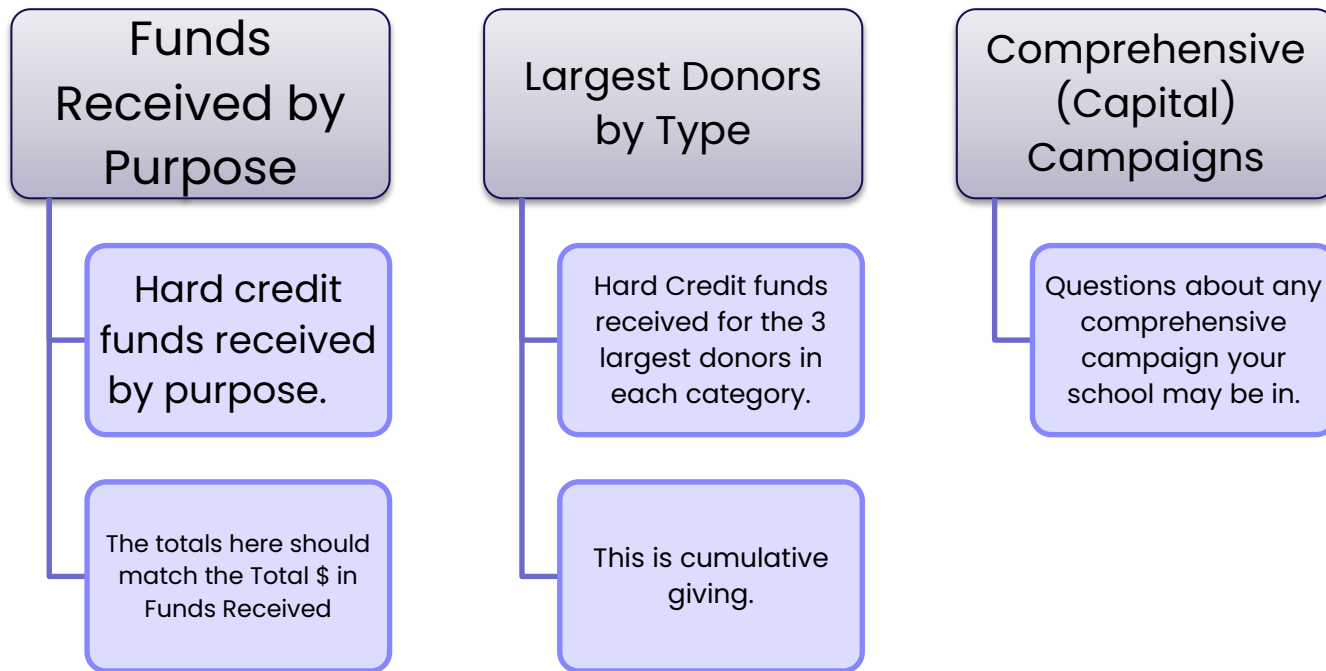
DASL



Advancement Additional Details



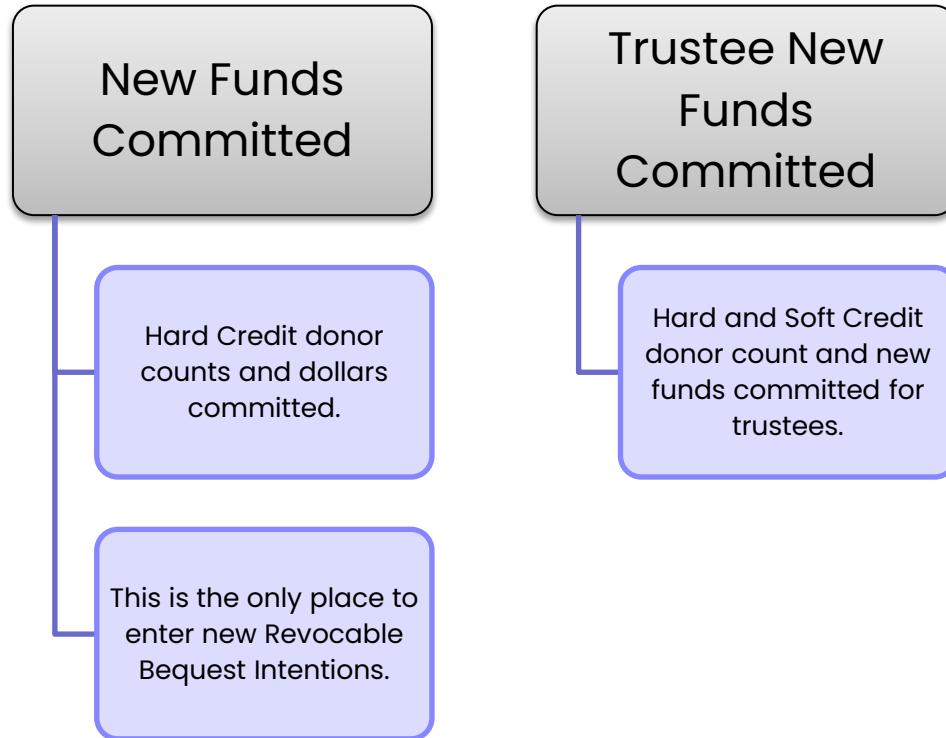
DASL



Advancement Activity



DASL



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 (i.e.: United Way, Benevity)?

- Count fundraising consortia as hard credit in Other Organizations

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 as Funds Received
- The full value of the pledge is counted as New Funds Committed
- Do NOT count pledge payments in New Funds Committed

Agenda for the Second Half of Our Time



DASL

- **Data Entry**

- **Funds Received**
- **Advancement Additional**
- **Advancement Activity**

- **Breakout Rooms**

- **Advancement Data Management System**
- **Hard & Soft Credit**
- **Other Definitions**

2025–2026 Data Collection Dates

- August 11, 2025– Data Entry Opens for DASL Data Foundation and DASL|BIIS Financial Operations for schools
- October 17, 2025 – DASL Data Foundation Data Entry closes
- November 19 – DASL Data Foundation Data cleaned and released for reporting
- December 5, 2025 – DASL|BIIS Financial Operations Data – closed for scrubbing

Thank you for joining us!



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National Association
of *Independent* Schools