

H. Daniel Heist, Ph.D.

Assistant Professor of Nonprofit Management and Social Impact
George W. Romney Institute for Public Service and Ethics
Brigham Young University
769 TNRB, BYU Campus, Provo, UT 84602
dan_heist@byu.edu • 801-414-3018

DONOR ADVISED FUND RESEARCH COLLABORATIVE

Cofounder and Co-Principal Investigator

<https://www.dafresearchcollaborative.org/>

ACADEMIC EXPERIENCE

Assistant Professor of Nonprofit Management and Social Impact

George W. Romney Institute of Public Service and Ethics
Brigham Young University (2021 - present)

Assistant Professor of Public Administration and Nonprofit Management

Department of Public and International Affairs
University of North Carolina Wilmington (2019 - 2021)

Instructor, Research Assistant, Teaching Assistant

School of Social Policy and Practice
University of Pennsylvania (2015 - 2019)

Research Assistant

Lilly Family School of Philanthropy, IUPUI (2008-2010)

EDUCATION

Ph.D. Social Welfare (2019)

School of Social Policy and Practice, University of Pennsylvania.

Dissertation: Understanding donor-advised funds: Analyses of the behavioral economic, macro-economic, and public policy factors explaining the growth of an emerging trend in philanthropy.

M.A. Philanthropic Studies, Lilly Family School of Philanthropy, Indiana University
Purdue University Indianapolis. (2010)

B.A. Speech Communication, College of the Liberal Arts, Pennsylvania State
University. (2003)

PROFESSIONAL EXPERIENCE

Major Gifts Officer, Associate Director of Development, LDS Philanthropies, The Church of Jesus Christ of Latter-day Saints. (June 2010 – August 2015)

Development Assistant, The Lilly Family School of Philanthropy, Indiana University Purdue University. (August 2008 – May 2010)

Assistant Director of Annual Giving, Brigham Young University LDS Philanthropies, The Church of Jesus Christ of Latter-day Saints. (February 2006 – August 2008)

PUBLICATIONS

Peer-Reviewed Journal Articles

Heist, H. D., Shaker, G., Christensen, R. K. (in press). Familiarity matters: Corporate philanthropy and employee workplace giving and volunteering. *Voluntary Sector Review*.

Heist, H. D., Cummings, B. F., Farwell, M. M., Cnaan, R., & Andrews, E. (2022). Tubs, tanks, and towers: Donor strategies for donor-advised funds giving. *Nonprofit Management and Leadership*, 1–23. <https://doi.org/10.1002/nml.21544>

Heist, H. D., Cnaan, R. A., Scott, M. L., Moodithaya, M. S, Bennett, M. (2021). The philanthropic poor: Prosocial behavior in rural India. *Nonprofit and Voluntary Sector Quarterly*.

Cnaan, R. A., Scott, M. L., Heist, H. D., Moodithaya, M. S. (2021). Financial inclusion in the digital banking age: Lessons from rural India. *Journal of Social Policy*. <https://www.doi.org/10.1017/S0047279421000738>

Heist, H.D., Farwell, M., Cummings, B., Cnaan, R., Andrews, E., Shamash, R. (2021). Understanding the donor-advised fund giving process: Insights from current DAF users. *Nonprofit and Voluntary Sector Quarterly*, <https://doi.org/10.1177/08997640211011248>

Heist, H. D., Cnaan, R. A., Ruiz, S. (2020) The Emigration of pro-social behaviors: A comparative analysis of Colombian and US Latter-day Saints. *Voluntas*. DOI [10.1007/s11266-020-00243-4](https://doi.org/10.1007/s11266-020-00243-4)

Heist, H. D., Vance-McMullen, D. (2019) Understanding donor-advised funds: How grants flow during recessions. *Nonprofit and Voluntary Sector Quarterly* 48(5), 1066-1093.

Heist, H. D., Cnaan, R. A., & Lough, B. J. (2019) Determinants of serving a mission: Senior volunteering among latter-day saints. Submitted to: *Psychology of Religion and Spirituality*.

- Heist, H. D., Cnaan, R. A. (2018). Price and agency effects on charitable giving behavior. *Journal of Behavioral and Experimental Economics*.
doi.org/10.1016/j.socec.2018.09.007
- Scott, M. L., Cnaan, R. A., & Heist, H. D. (2018). The clergy as a director of a local voluntary association, *Society and Welfare*. (Hebrew: *Hevra VeRevacha*), 38(1), 97-118.
- Cnaan, R. A., Heist, H. D. & Storti, M. H. (2017). Episodic volunteering at a religious megaevent: Pope Francis' visit to Philadelphia. *Nonprofit Management and Leadership* 28(1), 85-104.
- Heist, H. D., & Cnaan, R. A. (2016). Faith-based international development work: A review. *Religions* 7(3), 1-17.

Book Chapters

- Vance-McMullen, D., Heist, H. D. (2021). Donor-Advised Fund (DAF) Basics. In Temple, E. and Shaker, G. (Eds.) *Achieving Excellence in Fundraising*.
- Cnaan, R. A. & Heist, H. D. (2018). Religious congregations as community hubs and sources of social bonding. In R. A. Cnaan and C. Milofsky (Eds.). *Handbook of community and movements and local organizations* (Volume 2). New York: Springer.

Articles in Preparation

- Heist, H. D., Vance-McMullen, D., Harper, L. Give me some slack: DAF giving during the pandemic.
- Stone, K., Murray, I., Heist, H.D. DAF Policies and Intergenerational Justice.

Technical Reports

- Heist, H.D. & Stone, K. (January, 2023). *Self-Regulating Donor Advised Funds: An Analysis of Inactive Account Policies and Endowed DAFs*.
https://www.dafresearchcollaborative.org/s/Self-Regulating-DAFs_6Jan.pdf
- Vance-McMullen, D. & Heist, H. D. (March, 2022). *Donor Advised Fund Account Patterns and Trends (2017-2020)*.
<https://www.dafresearchcollaborative.org/s/DAFRC-Patterns-and-Trends-Report.pdf>

Cnaan, R. A., Heist, H. D., Scott, M. Chun, H. L., Sarro, E. (2017) *Study of educational administration among top universities in America*. A report requested by the Kyung Hee University, Seoul, Korea

Reviewed Articles for:

Nonprofit and Voluntary Sector Quarterly
Nonprofit Management and Leadership
Nonprofit Policy Forum
Public Personnel Management
Voluntas
Journal for the Scientific Study of Religion

GRANTS

2022 Bill & Melinda Gates Foundation. Donor-Advised Fund Research Collaborative – National Study on DAFs. \$750,000

2022 AFP Levis Award for Research on Fundraising. Fundraising from DAFs: Evidence from Experts. \$8,000

2022 Philanthropy Roundtable. DAF Policy Research: Inactive and Endowed DAFs. \$7,000.

2022 Brigham Young University, Ballard Center for Social Impact Graduate Fellows Grant. ARNOVA Presentation for Lindsay Harper. \$1,763

2020 Bill & Melinda Gates Foundation. Donor-Advised Fund Research Collaborative – Data Initiative. \$200,251

2018 University of Pennsylvania, India Research and Engagement Fund. Social impact of mobile banking applications and cashless transactions in rural villages in India. (Co-PI) \$60,380

2018 Southern Baptist Convention, Study for the economic impact of SBC congregations. \$5,000

2017 Kyung Hee University. Study of educational administration among top universities in America. (Co-PI) \$7,500

2017 University of Pennsylvania, School of Social Policy and Practice, Competitive Summer Research Fellowship. \$6,100

2016 Private support given from three sources for the study of Latter-day Saint senior missionary service. \$21,000.

INVITED TALKS/PODCASTS

DAF Summit 2022. Research Update on Donor-Advised Funds. (November, 2022)

DAF Summit 2022. Panel Discussion on Trends with Donor-Advised Funds. (November, 2022)

National Association for Charitable Gift Planners. The Latest Research on Donor-Advised Funds (November, 2022)

Philanthropy Roundtable. DAF policies on Inactive and Endowed Accounts. (November, 2022)

Community Foundation Public Awareness Initiative. DAF Trends Report. (April, 2022)

Graham-Pelton, Make Mission Podcast. DAF Episode. (April 2022)

Urban Institute. Data and Technology: Resources and Implications for Nonprofit Regulation and Oversight (March, 2021)

The Carter Center's Philanthropy Council (March, 2021)

Association of Fundraising Professionals (AFP), Cape Fear Chapter (September, 2020)

Donor-Advised Fund Research. Deseret Trust Company (June, 2020)

To bequest or not to bequest: A review of planned giving vehicles. Osher Lifelong Learning Institute at UNCW. (March, 2020)

Graduation speech. University of Pennsylvania, School of Social Policy and Practice. (May, 2019)

Understanding donor-advised funds. Romney Institute for Public Administration, Brigham Young University. (May, 2018)

Trends and regulations of donor-advised fund. Deseret Trust Company. (May, 2018)

Report on donor-advised fund analysis. National Philanthropic Trust. (January, 2018)

The dynamics of donor-advised funds. The Kenneth C. Griffin Department of Economics, University of Chicago. (November, 2017)

PAPERS PRESENTED AT CONFERENCES

- Vance-McMullen, Harper, Heist. 2022 Give me some slack: DAF giving during the pandemic. Presented at the Association for Research of Nonprofit Organizations and Voluntary Action.
- Heist, H.D. 2022. Donor-Advised Funds: A Philanthropic Intermediary in the Commons. Presented at the Philanthropy as a Commons Conference, Aspen Grove, UT.
- Heist, H.D. & Witesman, E. 2022. Robbing the Shareholders vs. Robber Baron Philanthropy: How Should Corporate Wealth Be Used to Benefit the World? Presented at International Association for Business in Society, San Francisco, CA
- Heist, Farwell, Cummings. 2021. Tubs, Tanks, and Towers: Models of Donor-Advised Fund Giving. Presented at the Association for Research on Nonprofit Organizations and Voluntary Action, Atlanta, GA.
- Vance-McMullen, D., Heist, H. D. 2021. Donor-Advised Fund Research Collaborative. Presented at the Association for Research on Nonprofit Organizations and Voluntary Action, Atlanta, GA.
- Heist, H. D. 2020. DAFs and the Commons: Donor-Advised Funds and Donor Fatigue. Presented virtually at the Association for Research on Nonprofit Organizations and Voluntary Action.
- Heist, H. D. Christensen, R., Shaker, G. 2020. Talk is Cheap: How Perceptions of Corporate Philanthropy Affect Employee Participation. Presented virtually at the Association for Research on Nonprofit Organizations and Voluntary Action.
- Heist, Farwell, Cummings. 2019. How and why people use donor-advised funds: Interviews with DAF users. Presented at the Association for Research on Nonprofit Organizations and Voluntary Action, San Diego.
- Heist, Cnaan, Ruiz. 2019. The emigration of pro-social behavior: A comparative analysis of Colombian and US Latter-day Saints. Presented at the Association for Research on Nonprofit Organizations and Voluntary Action, San Diego.
- Heist, Cnaan, Ruiz. 2019. The emigration of pro-social behavior: A comparative analysis of Colombian and US Latter-day Saints. Presented at the Society for the Scientific Study of Religion, St. Louis.
- Heist, H. D. Vance-McMullen, D. Understanding the flow of money through donor-advised funds. Paper presented at the Annual Research Conference of the Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA). Austin, TX. November 15-16, 2018

Heist, H. D. Evaluating donor-advised fund regulations. Paper presented at the Annual Research Conference of the Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA). Austin, TX. November 15-16, 2018

Delaney, B., Heist, H. D. Finding the mustard seeds. Presentation at the Planned Giving Council of the Greater Philadelphia Area. Philadelphia, PA. October 25, 2018.

Heist, H. D., & Cnaan, R.A. Determinants of commitment: Senior volunteering among Latter-day Saints. Paper presented at the Annual Research Conference of the Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA). Grand Rapids, Michigan. November 16-18, 2017

Delaney, B., Heist, H. D. Going to the chapel: Linking pews and planned giving. Paper presented at the Annual Research Conference of the Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA). Grand Rapids, Michigan. November 16-18, 2017.

Heist, H. D. Cnaan, R. A., Mission possible: Senior volunteering among Latter-day Saints. Paper presented at the Annual Research Conference of the Society for the Scientific Study of Religion (SSSR). Washington, D.C. October 12-14, 2017.

Heist, H. D. Agency and price effects of charitable giving: Evidence from M Turk experiments. Paper presented at the Science of Philanthropy Initiative 4th Annual Conference. Chicago. September 6-7, 2017

TEACHING EXPERIENCE

Brigham Young University, Romney Institute of Public Service and Ethics:

MPA 631 – *Program Evaluation*

MPA 650 – *Nonprofit Management*

MPA 659 – *Grantwell*

MSB 376 – *Leveraging Organizations for Social Impact*

MSB 378 – *Measuring Social Impact*

The Fundraising School – IU Lilly Family School of Philanthropy:

Current Affairs Series Public Offering: Engaging, Soliciting & Stewarding DAF Donors

University of North Carolina, Department of Public and International Affairs, Master's in Public Administration (MPA) program:

MPA 502 – *Human Resources Management for Public and Nonprofit Organizations*

MPA 517 – *Strategic Planning for Public and Nonprofit Organizations*

MPA 542 – *Interorganizational Relations*

MPA 507 – *Applied Management Tools*

University of Pennsylvania, School of Social Policy and Practice, Master's degree in Nonprofit Leadership (NPL) program:

The Nonprofit Sector: Concepts and Theories

Philanthropy and Fundraising: Tools for Managers of Nonprofit Organizations.

Teaching Assistant, with Eileen Heisman “

Data Analysis for Social Impact. Teaching Assistant, with Dr. Matthew Bennett

Nonprofit Law. Teaching Assistant, with Don Kramer, Esq.

The Nonprofit Sector: Concepts and Theories. Teaching Assistant, with Dr. Chao Guo

ACADEMIC SERVICE

Romney Institute Fundraising Committee, Romney Institute for Public Service and Ethics, Brigham Young University (2022 – present)

Curriculum Committee, Romney Institute for Public Service and Ethics, Brigham Young University (2021 – present)

Co-Advisor, Nonprofit Management Minor, University of North Carolina Wilmington (2020-2021)

Academic Advisor, Nonprofit Leadership Concentration – MPA, University of North Carolina Wilmington (2019 – 2021)

Chair, Doctoral Student Steering Committee, School of Social Policy and Practice, University of Pennsylvania and Indiana University (2016 – 2018)

Research Assistant, National Study of Congregations Economic Practices, Lilly Family School of Philanthropy at Indiana University (2018)

President of Philanthropic Studies Student Association, Lilly Family School of Philanthropy at Indiana University (2009 – 2010)

SERVICE IN THE COMMUNITY

Founding Board Member, The Josh Vesslee Foundation (2022 – present)

Founding Board Member, Hope for Liberia Education Fund (2022 – present)

Board of Directors, The Children's Museum of Wilmington (2020 – 2021)

Board of Directors, Voyage of Wilmington (2020 – 2021)

Founding Board Member, Children's Synergistic Learning Collaborative, Salt Lake City, UT (2014 – 2015)

Board of Directors, Executive Committee, Now I Can Foundation, Provo, UT. (2011 – 2014)

Board of Directors, Alliance House, Salt Lake City, UT. (2010 – 2011)

Geneva Switzerland Mission, The Church of Jesus Christ of Latter-day Saints (2003 – 2005)

President, Co-founder, Penn State Student United Way, State College, PA (2001 – 2003)

Overall Morale Committee Chair, Penn State Dance Marathon, State College, PA (1998 – 2003)

Other Service: Habitat for Humanity, United Way, Alternative Spring Break, MLK Day of Service

CERTIFICATIONS

Certified Fundraising Executive (CFRE) - 2011