

2020 Data File Specifications DonorScape® Test File

Grenzebach Glier and Associates is pleased to offer a free, online trial of Donor Scape Wealth Screening on **up to 1,000 constituent records** at no cost or obligation to prospective clients.

- All data and results are confidential and not used for any other purpose. Data will be destroyed at the conclusion of the trial.
- GG+A strongly recommends that records used in the test file be selected at random from the total population to be screened.
- DONORSCAPE is designed to find wealth at the individual or household level. Corporations, foundations, and non-individual entities will not match to DONORSCAPE data sources.

Please provide data tables in the following file format:

- ASCII text (.txt) with field headers
- Field delimiter must be comma/quote, pipe, or tab
- Contact GG+A for other formats such as Excel or MS Access

Include with the data:

- A copy of the record layout
- Definitions of all codes used within the file, such as constituent codes, marital status, client defined fields, etc.

Records for screening:

- Include all living individuals
- Exclude all corporations, foundations, and other non-individual entities

Data Transfer:

- When the file is ready to be transferred, please upload to our secure dropbox located at: http://filesend.DonorScape.com
- GG+A will confirm receipt in 1–2 business days.
- GG+A provides end-to-end 128-bit SSL encryption for file transfers. For additional security, GG+A
 recommends transferring data in encrypted archives. There are many software packages that enable
 encrypted archives, including the free, open-source package 7-Zip, available at http://www.7-zip.org.

Contact us:

• If you have any questions regarding your data file submission, please contact Andrew Beharelle at (312) 800-8834 Ext. 4019 or abeharelle@grenzglier.com.

Biographical Data

Required fields in Bold

Unique Entity ID Number ProspectID Include any leading zeros Head of Household Indicator Title Title Primary household member for solicitation e.g., Mr., Mrs., Dr. First Name Middle Name Middle Name Last Name Middle Name LostName Suffix Suffix e.g., Jr., Sr., III Date of Birth DoteOfBirth mm/dd/yyyy (partial DOB is okay) Age Age Gender Gender Gender Marital Status Spouse ID SpouseID If separate record exists Spouse Inst Name SpouseFirst Regardless of separate spouse record Spouse Middle Name / Initial SpouseMiddle Regardless of separate spouse record Spouse Inst Name SpouseMiddle Regardless of separate spouse record Employer/Business Name JobTitle JobTitle Home Address Line 1 HomeStreetAddress Street Name & Number Home City HomeAptUnitSuite Apartment, Unit, or Suite Home State/Province HomeZipCode HomeZipCode Home Nation/Country HomeAphone Street Name & Num	Data	GG+A Preferred Header	Notes
Title Title First Name First Name Middle Name First Name Middle Name Last Name	Unique Entity ID Number	ProspectID	Include any leading zeros
First Name Middle Name / Initial Last Name Suffix Suffix Suffix Suffix Suffix Date of Birth Date Of Bone	Head of Household Indicator	НоН	Primary household member for solicitation
Middle Name / Initial Last Name Suffix Suffi	Title	Title	e.g., Mr., Mrs., Dr.
Last Name Suffix Suffix Suffix e.g., Jr., Sr., III Date of Birth Date of Birth Date of Birth Age Gender Gender Marital Status Spouse ID Spouse ID Spouse First Name Spouse First Name Spouse First Name Spouse Job Title Spouse Last Name Regardless of separate spouse record Regardless of separate spouse record Regardless of separate spouse record Spouse Last Name Regardless of separate spouse record Regardless of separate spouse record Spouse Last Name Regardless of separate spouse record Regardless of separate spouse record Regardless of separate spouse record Spouse Last Name Number Apartment, Unit, or Suite Home City Home State / Home State Home Postal Code Home Nation/Country Home Telephone Number Preferred Email Address Business Address Line 1 Business Address Line 1 Business State / Province Business State / Business Stote Business Nation/Country Business Telephone Number Seasonal Address Line 1 Seasonal City Seasonal State / Province Seasonal State / Province Seasonal State / Province Seasonal State / Province Seasonal Postal Code Seasonal Postal Code	First Name	FirstName	
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Date of Birth Age Age Gender Marital Status Spouse ID Spouse ID Spouse First Name Spouse Middle Name / Initial Spouse Age Employer/Business Name Home Address Line 1 Home State/Province Home Postal Code Home Telephone Number Preferred Email Address Business Nation/Country Business Nation/Count	Last Name	LastName	
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Marital Status Spouse ID Spouse First Name Spouse First Name Spouse Middle Name / Initial Spouse Middle Name / Initial Spouse Last Name Spouse Last Name Spouse Last Name Spouse Last Name Employer Job Title Home Address Line 1 Home Address Line 2 Home AptUnitSuite Home State/Province Home Telephone Number Preferred Email Address Business Address Line 1 Business Address Line 1 Business State Business Address Line 1 Business State Business Address Line 2 Business Postal Code Business Nation/Country Business Nation/Country Business Nation/Country Business Nation/Country Business Nation/Country Business Nation/Country Business Telephone Number Seasonal Address Line 1 Seasonal State/Province Seasonal State/Province Seasonal State/Province Seasonal Postal Code Seasonal Postal Code Seasonal State Spouse Last Regardless of separate spouse record Regardles of separate spouse record Regardless of separate spouse record Regardles of separate spouse record Regardles of separate spouse record	Age	Age	
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Home Address Line 1	Spouse Last Name	SpouseLast	Regardless of separate spouse record
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Home Address Line 2 Home City Home State / Province Home Postal Code Home Nation / Country Home Telephone Number Preferred Email Address Business Address Line 1 Business Address Line 2 Business City Business State / Province Business Nation / Country Business Nation / Country Business Nation / Country Business Telephone Number Business State / Province Business Postal Code Business Nation / Country Business Telephone Number Seasonal Address Line 2 Seasonal City Seasonal State / Province Seasonal State / Province Seasonal State / Seasonal State	Job Title	JobTitle	
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,	Seasonal State/Province	SeasonalState	
Seasonal Nation/Country SeasonalNation	Seasonal Postal Code	SeasonalZipCode	
	Seasonal Nation/Country	SeasonalNation	

Notes:

- Please include the most current active address that you have on record.
- Ensure Home Address is primary residence; not necessarily "preferred" mailing address. **GG+A cannot** guarantee the accuracy of data acquired using a non-residential address when provided as home address.
- Foreign addresses, PO Boxes, APO/FPO, and addresses in Puerto Rico, Virgin Islands, Guam and other U.S. Territories are acceptable.

Relationship Information

Required fields in Bold

Data	GG+A Preferred Header	Notes
Primary Constituent Type	Relationship	e.g., Alumni, Parent, Friend, etc.
Preferred Class Year	PreferredClassYear	For education institutions
# of Current Volunteer Activities	CurrentVolActivity	
# of Past Volunteer Activities	PriorVolActivity	
# of Events Attended	Events	In the last five calendar years
Planned Giving Indicator	PlannedGiving	Planned giving pledge or indicated "in will"
Surveyed	Survey	Questionnaire or survey responder
Opt-In	OptIn	Opted-in to publication, email, web, etc.
Gift Officer Assigned as Primary	AssignedSolicitor	Lastname, Firstname
Gift Officer School/Unit/Area	SolicitorUnit	e.g., Athletics, Business, Planned Giving

Notes:

- DONORSCAPE provides an additional 10 fields (referred to as "Client Defined Fields") which store string
 data of any type or content. Any supplied data intended to be loaded into the DONORSCAPE application
 which is not assigned to a field with a "GG+A Preferred Header" will be loaded into a Client Defined
 Field. These fields may be used in custom queries for list generation and appear in some pre-formatted
 reports. In addition, Client Defined Fields can be exported to a spreadsheet or text file, along with other
 selected fields.
- Indicate the data you wish to capture in Client Defined Fields as "ClientDefinedField_1," "ClientDefinedField_2," etc.

Giving History

Required fields in Bold

Giving History Counting:

- Gift Commitments and Outright Gifts (i.e., no pledge payments)
- Include soft/recognition credits from non-individuals (such as donor advised funds or family foundations) when appropriate
- Indicate your spouse and soft crediting policy (i.e., split or equal credit), **especially regarding credits** from non-individual entities
- Unless otherwise indicated, Gifts/Giving means Commitments

Giving History Exclusions:

- Matching gifts (the employer match)
- In-kind gifts of "service" (in-kind gifts of real estate, art, securities, etc. are okay)
- Write-offs

Data	GG+A Preferred Header	Notes
Cumulative Total Giving	TotalGivingDollars	Commitments
Number of Total Commitments	TotalNumberOfGifts	
Largest Single Gift Amount	LargestGiftAmount	Cash (outright gift or pledge payment)
Largest Single Gift Date	LargestGiftDate	mm/dd/yyyy, oldest date
Most Recent Gift Date	MostRecentGiftDate	mm/dd/yyyy, most recent transaction
Most Recent Gift Amount	MostRecentGiftAmount	Commitment or Cash
Total Giving - Current FY	CurrentFYTotal	Current incomplete fiscal year
Total Giving - Last FY	Last1stFYTotal	Last fiscal year
Total Giving - Last 2 nd FY	Last2ndFYTotal	Year prior to last year
Total Giving - Last 3 rd FY	Last3rdFYTotal	
Total Giving - Last 4 th FY	Last4thFYTotal	
Total Giving - Last 5 th FY	Last5thFYTotal	
Total Giving - Prior to Last 5 th FY	PreLast5thFYTotal	
First Gift Amount		Commitment
First Gift Date		mm/dd/yyyy

Notes:

• The sum of Total Giving by fiscal year (including "Prior to Last 5th FY") should equal "Cumulative Total Giving".