

2020 Data File Specifications

DONORSCAPE® Test File

Grenzebach Glier and Associates is pleased to offer a free, online trial of DONORSCAPE® 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

Data	GG+A Preferred Header	Notes
Unique Entity ID Number	<i>ProspectID</i>	Include any leading zeros
Head of Household Indicator	<i>HoH</i>	Primary household member for solicitation
Title	<i>Title</i>	e.g., Mr., Mrs., Dr.
First Name	<i>FirstName</i>	
Middle Name / Initial	<i>MiddleName</i>	
Last Name	<i>LastName</i>	
Suffix	<i>Suffix</i>	e.g., Jr., Sr., III
Date of Birth	<i>DateOfBirth</i>	mm/dd/yyyy (partial DOB is okay)
Age	<i>Age</i>	
Gender	<i>Gender</i>	
Marital Status	<i>MaritalStatus</i>	
Spouse ID	<i>SpouseID</i>	If separate record exists
Spouse First Name	<i>SpouseFirst</i>	Regardless of separate spouse record
Spouse Middle Name / Initial	<i>SpouseMiddle</i>	Regardless of separate spouse record
Spouse Last Name	<i>SpouseLast</i>	Regardless of separate spouse record
Employer/Business Name	<i>Employer</i>	As it is available
Job Title	<i>JobTitle</i>	
Home Address Line 1	<i>HomeStreetAddress</i>	Street Name & Number
Home Address Line 2	<i>HomeAptUnitSuite</i>	Apartment, Unit, or Suite
Home City	<i>HomeCity</i>	
Home State/Province	<i>HomeState</i>	
Home Postal Code	<i>HomeZipCode</i>	
Home Nation/Country	<i>HomeNation</i>	
Home Telephone Number	<i>HomePhone</i>	
Preferred Email Address	<i>PreferredEmail</i>	
Business Address Line 1	<i>BusinessStreetAddress</i>	Street Name & Number
Business Address Line 2	<i>BusinessAptUnitSuite</i>	Apartment, Unit, or Suite
Business City	<i>BusinessCity</i>	
Business State/Province	<i>BusinessState</i>	
Business Postal Code	<i>BusinessZipCode</i>	
Business Nation/Country	<i>BusinessNation</i>	
Business Telephone Number	<i>BusinessPhone</i>	
Seasonal Address Line 1	<i>SeasonalStreetAddress</i>	Street Name & Number
Seasonal Address Line 2	<i>SeasonalAptUnitSuite</i>	Apartment, Unit, or Suite
Seasonal City	<i>SeasonalCity</i>	
Seasonal State/Province	<i>SeasonalState</i>	
Seasonal Postal Code	<i>SeasonalZipCode</i>	
Seasonal Nation/Country	<i>SeasonalNation</i>	

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	<i>Relationship</i>	e.g., Alumni, Parent, Friend, etc.
Preferred Class Year	<i>PreferredClassYear</i>	For education institutions
# of Current Volunteer Activities	<i>CurrentVolActivity</i>	
# of Past Volunteer Activities	<i>PriorVolActivity</i>	
# of Events Attended	<i>Events</i>	In the last five calendar years
Planned Giving Indicator	<i>PlannedGiving</i>	Planned giving pledge or indicated "in will"
Surveyed	<i>Survey</i>	Questionnaire or survey responder
Opt-In	<i>OptIn</i>	Opted-in to publication, email, web, etc.
Gift Officer Assigned as Primary	<i>AssignedSolicitor</i>	Lastname, Firstname
Gift Officer School/Unit/Area	<i>SolicitorUnit</i>	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	<i>TotalGivingDollars</i>	Commitments
Number of Total Commitments	<i>TotalNumberOfGifts</i>	
Largest Single Gift Amount	<i>LargestGiftAmount</i>	Cash (outright gift or pledge payment)
Largest Single Gift Date	<i>LargestGiftDate</i>	mm/dd/yyyy, oldest date
Most Recent Gift Date	<i>MostRecentGiftDate</i>	mm/dd/yyyy, most recent transaction
Most Recent Gift Amount	<i>MostRecentGiftAmount</i>	Commitment or Cash
Total Giving - Current FY	<i>CurrentFYTotal</i>	Current incomplete fiscal year
Total Giving - Last FY	<i>Last1stFYTotal</i>	Last fiscal year
Total Giving - Last 2nd FY	<i>Last2ndFYTotal</i>	Year prior to last year
Total Giving - Last 3rd FY	<i>Last3rdFYTotal</i>	
Total Giving - Last 4th FY	<i>Last4thFYTotal</i>	
Total Giving - Last 5th FY	<i>Last5thFYTotal</i>	
Total Giving - Prior to Last 5th FY	<i>PreLast5thFYTotal</i>	
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”.