

# Grants management system compatibility questionnaire

## Reference copy for online questionnaire

Thank you for your interest in assessing the compatibility of your grant management system with publishing grants data using the 360Giving Data Standard.

Below is a list of the questions included in the grantmaking system questionnaire. We think the questionnaire is best completed by someone within your organisation who has a very good understanding of the system data model and capability. However, we advise reviewing the questions below to help determine who will be best able to complete the questionnaire. Please note that the online questionnaire uses conditional skip-logic, so depending on your choices you will only be required to answer the questions applicable to your system.

## Questions

About you, your organisation and the systems (Step 1 of 5)
First name
Last name
Email
Your role
Company Name
Name of the product you are answering this questionnaire about.
<p>Does your system manage grants to...</p> <ul style="list-style-type: none"><li>• Organisations</li><li>• Individuals</li><li>• Organisations and individuals</li></ul> <p>Please note that this questionnaire concentrates on assessing the compatibility of systems that make grants to organisations. If your system is primarily designed to manage grants to individuals, please get in touch via <a href="mailto:support@threesixtygiving.org">support@threesixtygiving.org</a> before continuing with this questionnaire.</p>
<p>What best describes your system?</p> <ul style="list-style-type: none"><li>• Relational Database Management System</li><li>• NoSQL Database Management System</li><li>• Other</li></ul>

Recording data in your system (Step 2 of 5)				
Do your system deployments include fields to record the following information?				
Field name	Yes, as a required field	Yes, but not as a required field	No	Not sure
Name of grant recipient organisation				
Title of the grant or project				
Unique ID of the grant				
Description of the grant				
Grant amount				
Currency of the grant amount				
Date the grant decision was made				
Name of the organisation making the grant				
Charity number of the recipient organisation				
Company number of the recipient organisation				
Postal address of the recipient organisation				
Geodata of the recipient organisation				
Place name (e.g. postal address) of the where the grant activity will take place				
Geodata of where the grant activity takes place				
Planned start date of the grant activity				
Planned end date of the grant activity				
Planned grant duration				
A web link to more details of the grant programme				
Title of the grant programme				
Date/time the grant record was last modified				
If you answered 'not sure' to any of the above, please explain why below				
Please describe any validation, for example a character limit, on the field recording the grant title.				
How is the field recording a unique ID for the grant populated? <ul style="list-style-type: none"> <li>• Automatically populated</li> <li>• Manually input by user</li> <li>• Other</li> </ul>				

Please describe any validation, for example a character limit, on the field recording the grant description.
Please describe the format of the field used to record grant currency (e.g. is this a picklist field?)
Please describe the format of the field recording the date the grant was awarded and any validation on the field.
Please describe the format and any active validation on fields (e.g. character limits) to record the charity number, company number, or any other external reference number
Please describe the fields used to record the location of the recipient organisation. <i>Please include details on the field(s) format, e.g. whether it is a picklist or freetext field, any validation on the data and, if applicable, details of lookups to any established gazatter. For example, the ONS code for a local authority ward, or parliamentary constituency.</i>
Please describe the fields used to record the location the grant activity will take place. <i>Please include details on the field(s) format, e.g. whether it is a picklist or freetext field, any validation on the data and, if applicable, details of lookups to any established gazatter. For example, the ONS code for a local authority ward, or parliamentary constituency.</i>
Please describe the format of the fields to record the grant activity start and end date and grant duration, including any validation. For instance, is duration a formula field? Is there validation so that end date must be after start date).
Please describe the format and validations on fields used to record programme web links (e.g. must be a fully formatted URI including http:// or https:// prefix).
Please describe the format and validations on fields used to record the grant programme. For instance, are they free text or picklist fields?
How is the field recording the grant record last modified date populated? <ul style="list-style-type: none"> <li>Automatically populated</li> <li>Manually input by user</li> <li>Other</li> </ul>

Unique Identifiers (Step 3 of 5)			
The 360Giving Data Standard ' <b>Identifier</b> ' field is a unique ID for each grant. There are two parts of every Identifier: (1) a prefix issued by 360Giving to the funder which starts 360G; and (2) a unique ID generated by the system or funder. Does your system have:			
	Yes	No, but it could be created	No, and it can't be created
A field to record this identifier			
A field that generates this identifier using a formula			
Other			
Please describe and, if applicable, please provide the formula below.			
The 360Giving Data Standard ' <b>Recipient Org:Identifier</b> ' field is a globally unique identifier for the grant recipient organisation. There are two parts to every Recipient Org:Identifier: (1) A list code: a prefix that describes the list the identifier is taken from; and (2) An identifier taken from that list. Does your system have:			
	Yes	No, but it could be created	No, and it can't be created
A field to record this identifier			

A field that generates this identifier using a formula			
Other			
Please describe and, if applicable, please provide the formula below.			
The 360Giving Data Standard ' <b>Funding Org:Identifier</b> ' field is a globally unique identifier for the grant recipient organisation. There are two parts to every Recipient Org:Identifier: (1) A list code: a prefix that describes the list the identifier is taken from; and (2) An identifier taken from that list. Does your system have:			
	Yes	No, but it could be created	No, and it can't be created
A field to record this identifier			
A field that generates this identifier using a formula			
Other			
Please describe and, if applicable, please provide the formula below.			

#### Adapting the data model (Step 4 of 5)

Please describe the process whereby new data fields are added to instances of your system. Please include details if the process varies for different field types (i.e. date, text, formula).

Please describe the process whereby change sets are deployed to active instances of your system.

#### Extracting data (Step 5 of 5)

Does your system have the ability to set up a direct feed of 360Giving Data Standard formatted data for the purposes of publishing the data.

- Yes
- No

If yes, please explain the approach used.

*Please include (a) how new data gets into the file of a direct feed. (b) what approval/controls are in place to avoid grants being published that shouldn't (c) How do changes to data already published get pushed through to the direct feed.*

Does your system have the following:

	Yes	No
A pre-set 360Giving Data Standard compatible report		
Ability for users to create report templates		
Ability for users to customise how field names appear in report templates		
Ability for users to create report templates that transform the format of field values		

If you would like to tell us more, please do so in the box below

If manual manipulation is required to convert data extracted from the system to be compatible with the 360Giving Data Standard, please describe any guidance you provide publishers with to support this.

If there is anything else you would like to tell us about your system and its capability for compatibility with publishing data using the 360Giving Data Standard, you can do so in the text box below.

Consent: I understand and agree that information shared in this form will be processed and stored in accordance with 360Giving's privacy policy