

Data preparation guide for community foundations

Version 3 - November 2025

This guidance is for community foundations using the Digits2 grants management system on Salesforce only. If you do not use Digits2, contact the 360Giving Helpdesk via support@threesixtygiving.org to discuss your options for preparing your 360Giving data.

Overview

In 2017, 360Giving collaborated with UKCF to support the development of an add-on for the Digits2 (D2) system which made it straightforward to extract grant information from the system that was ready-formatted to the 360Giving Data Standard.

Community foundations participating in a pilot were consulted to agree on a field specification for the 360Giving data file, and a data extract tool was developed for use by any community foundation that wishes to share open grants data.

This tool, built into the Digits2 system, automates the technical aspects of preparing your data, making the process easier and quicker. However, there are some additional practical steps you need to follow when sharing your 360Giving data for the first time, for example the hosting and licensing of the data.

About the D2 report

The information included in the D2 extract

The D2 360Giving data extract tool allows you to publish useful information about the grants you have awarded.

The range of information fields included in the extract file is fixed, however you can control the content of your data by using report filters, for example to decide what time period or grant programmes will be included.

The table below in the [Appendix](#) contains the full list of fields included by default in the D2 extract.

The notes show whether a field is required, recommended, or optional and explain how the data is generated. They also list some common issues or things to check when preparing the data.

- **Required:** means the field must be included in your 360Giving data file. Each cell must be populated with data; it cannot be blank. These fields are **coloured green**.
- **Recommended:** means the field can be excluded from your 360Giving data file; however, it provides useful information that makes your data easier to understand and use. If some data is missing, the cell can be blank. Do not add filler text such as N/A. Cells should be either filled in properly or left entirely blank. These fields are **coloured yellow**.
- **Optional or Non Standard field - Optional:** both mean the field can be excluded from your 360Giving data with no impact on the usefulness of your data.

What to consider if you make grants to individuals

The D2 360Giving was set up in 2017 prior to the 360Giving Data Standard being expanded to include fields for sharing anonymised data about grants awarded to individuals.

If you would like to include grants to individuals in your 360Giving data, contact the 360Giving Helpdesk via support@threesixtygiving.org to discuss the best approach.

Anonymising donor names in programme titles.

If programme titles include the names of donors, the D2 360Giving extract has been developed to allow the names to be redacted. There is further guidance [below](#) about how to set programme names as 'undisclosed'.

How to use the D2 extract

Step 1. Contact 360Giving to get access to D2 extract

Each community foundation must be set up with access to the 360Giving reports folder in order to generate the source report and extract 360Giving data.

If you cannot find the 360Giving report folder in your D2 system, please contact 360Giving Helpdesk via support@threesixtygiving.org to request this to be set up.

It is possible to restrict access to the D2 tool to certain individuals in your organisation, or it can be made accessible to all users with a login.

About access restrictions

- If you want to restrict access, you will be asked for the names and emails of the people who are allowed to use the tool, so these permissions can be added to the system.
- If you are taking over publishing responsibilities in your organisation, your permission to access the extract may be restricted. If you have issues finding the **Export Grants Data to 360 Giving** part of your system, please let us know by emailing support@threesixtygiving.org so we can get you set up.

Information about your organisation

The following information about your organisation needs to be added into the system to populate key 360Giving fields. When you request access to the D2 extract for the first time, we will confirm these details with you.

360Giving field	Notes
Funding Org:Name	This is your organisation name as you want it to appear in your data. This could be your brand name rather than your full registered name.
Funding Org:Identifier	This is created based on your registered charity or company number.
Publisher prefix	This is used to register your organisation with 360Giving and provides a prefix for grant identifiers.

Step 2. Watch the walk-through video

The [video walk-through](#) is particularly useful to get an overview of the steps and how to export 360Giving data from your D2 system.

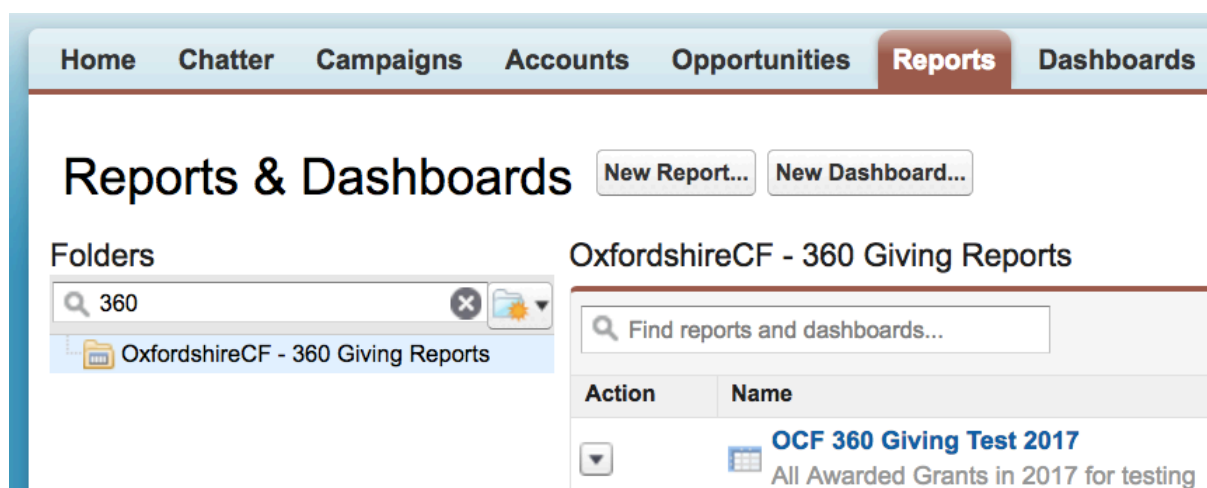
Please note when using the D2 export is that there are two areas:

1. The **source report** is where you select the range of grants you want to convert and get a preview of the data for checking data quality.
2. To format this data correctly, you then need to go to the **Export Grants Data to 360 Giving** area and load in the saved source report that you created in the first step. This will format the data correctly.

The video walkthrough goes through these two steps from **00:35 to 03:00** and the guidance below explains the steps in more detail

Step 3. Find the source report

A dedicated report folder is created for each community foundation containing the template report used as the source for the data extract. This report can be used to check data quality and to apply the correct filter criteria to limit the grant applications that are included.



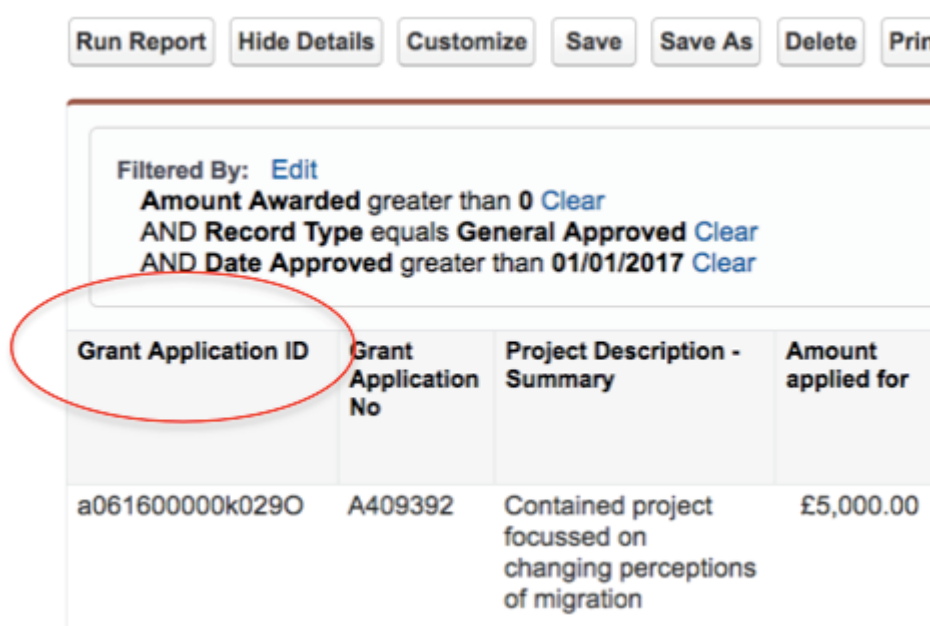
Navigate to the Reports tab:

- Locate the folder that is prefixed with your Community Foundation name and followed by '360Giving Reports' (enter 360 in the folder search box to find this folder)
- Click on the folder to display the template report
- Click on the report name to open the report

The report template contains all the fields that are sourced directly from the grant application and the associated applicant account records that are included in the agreed set of fields.

The default filter shown below is set to include all grant applications that have a Record Type of 'General Approved' and an amount greater than zero.

You can change the DATE filter to control the grant applications that you would like to include in the extract. Use this report to check the information that will be published and edit it in the source fields if required – particularly text fields such as Project description – summary and Purpose of Organisation and Project name.



Run Report Hide Details Customize Save Save As Delete Print

Filtered By: [Edit](#)
Amount Awarded greater than 0 [Clear](#)
AND Record Type equals General Approved [Clear](#)
AND Date Approved greater than 01/01/2017 [Clear](#)

Grant Application ID	Grant Application No	Project Description - Summary	Amount applied for
a061600000k029O	A409392	Contained project focussed on changing perceptions of migration	£5,000.00

Please Note:

- DO NOT remove the Grant Application ID (circled above) from the report OR move it from the first column – this must remain where it is for the extract process to work
- If you drag additional fields into the report, they will NOT be included in the grant extract file, but can be included for checking purposes
- If you include grants to organisations and individuals in your report, the individual grant recipient names will appear in the report. However, these will default to 'Individual recipient' in the extract file if they are using a Person Account.
- If project name is blank, then the output will default to 'Grant to org name' – if it is an individual person's account, this will output 'Individual recipient'

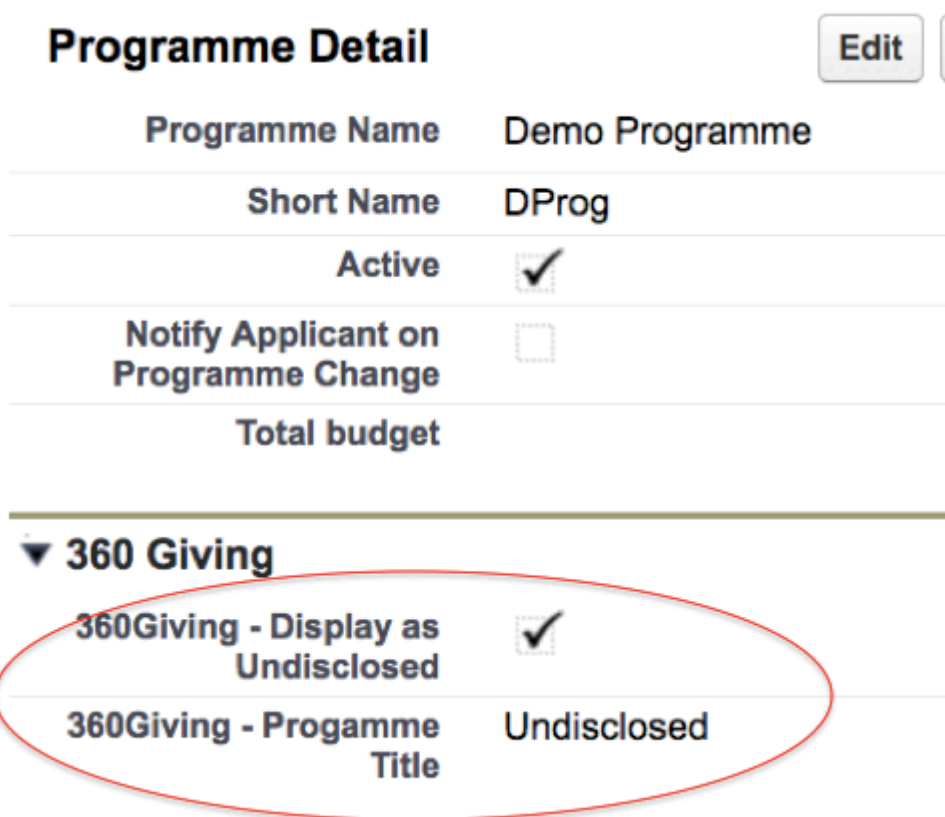
The following system-generated fixed or calculated values will not appear in the report but will be included in the extract file:

Table of system-generated fixed or calculated values

360Giving field	Salesforce source	Notes
Identifier	Grant Application Reference Number	The grant identifier will be the Grant Application unique Grant Application reference number prefixed with each Community Foundation's unique organisation identifier e.g. 360G-CF-XXXXXXX
FundingOrg:Identifier	Static value for each CF held on CF Profile record	This is a unique identifier for each Community Foundation made up of a prefix and their charity number. Eg GB-CHC-1151621
FundingOrg:Name	Static value for each CF held on CF Profile record	Name of Community Foundation
Planned Dates: Duration (months)	Default Value	To be calculated based on start and end dates
Beneficiary Location: Country Code	Default Value	Default to GB
Beneficiary Location:Geographic Code Type	Default Value	The data extract supports all geography levels: Super output area, Ward, Local authority, Westminster Parliamentary Constituency.
Currency	Default Value	Default to GBP
Last modified	Default Value	This is the date on which the data was last updated and will be populated automatically

Optional step 4. How to set your programme names as Undisclosed

If you do not want to publish the name of specific Programmes, there are 2 fields in the 360Giving section on a programme record. Tick the 360Giving – Display as undisclosed checkbox and the 360Giving – Programme Title will default to Undisclosed. This is the value that will show in the programme name on the data extract.



Programme Detail Edit

Programme Name	Demo Programme
Short Name	DProg
Active	<input checked="" type="checkbox"/>
Notify Applicant on Programme Change	<input type="checkbox"/>
Total budget	

▼ **360 Giving**

360Giving - Display as Undisclosed	<input checked="" type="checkbox"/>
360Giving - Programme Title	Undisclosed

Step 5. Generating the file

To generate the formatted extract file in Excel (.xls) format, go to the new tab called **Export Grants Data to 360 Giving**.

If you have issues finding the **Export Grants Data to 360 Giving** part of your system, please contact 360Giving Helpdesk via support@threesixtygiving.org and ask to be set up.

This can be added to the tabs across the top menu bar (by accessing customise my tabs via the + symbol) or just by locating it in the list of All tabs displayed when you click on the + symbol on the right of the menu bar.



Export Grants Data to 360 Giving

Community Foundation Detail	
Community Foundation Name	Oxfordshire Community Foundation
360Giving - Funding Org Id	GB-CHC-1151621
360Giving - Funding Org Name	Oxford Community Foundation

Select Source Report for Data	
Import grants from a report	<input type="text"/>

You will see your Community Foundation's summary identifier information displayed at the top. Click on the Import grants from a report dropdown, and the report template that is stored in the dedicated folder will be displayed.

Select Source Report for Data	
Import grants from a report	<div>✓ OCF 360 Giving Test 2017 - 2017-05-18 10:25:55</div>

Click on the report, and the following message will appear:

Foundation Name	Oxfordshire Community Foundation
Funding Org Id	GB-CHC-1151621
Funding Org Name	Oxford Co

Getting data. Please wait....

Report for Data

Import grants from a report: OCF 360 Giving Test 2017 - 2017-05-18 10:25:55 ▾

The total number of rows in the report will display.

Community Foundation Detail

Community Foundation Name	Demo Community Foundation
360Giving - Funding Org Id	GB-CHC-0123456
360Giving - Funding Org Name	The Demo Community Foundation

Select Source Report for Data

Import grants from a report: 360 Giving Test - 2017-08-03 15:25:49 ▾

Summary of report

Export Excel
Cancel

Report Data Summary

Total Rows in Report	60
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- Click on the 'Export Excel' button to generate the extract file. Note that the file may take longer to open if it contains a large number of records, so you may need to be patient.
- Open the Excel file to review the data.
- Save the file to your local drive as an .xlsx file. To do this, click on 'Save file as' and choose Excel Workbook with the .xlsx file extension.

Check your data

Once you have exported a file of your grants data, the next step is to check your data using the [360Giving Data Quality Checker](#) and correct any errors in your data that are flagged.

When you have exported a report from D2, before testing in the Data Quality Checker, the file needs to be saved in **Excel Workbook (xlsx)** file format.

The full guidance on using the Data Quality Checker can be found in the main guidance in Stage 2, Step 5. Check your data quality.

However, as the D2 report has been set up with a specific range of fields, you can expect to see the following feedback.

Summary

The **Summary** tab provides basic details about the file's content – the number of grants, the number of funding organisations, the date range, and the total value of the grants broken down by currency.

Validity

On the **Validity** tab, a common issue that can make your data invalid is **minus grant durations**.

The feedback will show you each minus value and where the issue is in your file, so you can note the row/cell and correct it there.

As noted in the Appendix, the minus is caused by inverted start and end dates or typos in the dates. The best way to fix these errors is to amend the values in your system and export your 360Giving data again.

Accuracy

There is an **Accuracy** tab where additional checks are shown, suggesting ways to improve the quality of your data. This feedback highlights things that don't look correct.

Charity and company numbers

If your charity or company number fields include data other than the numbers (filler text, extra numbers or letters), you will get an error message - **XX grants have a value provided in the Recipient Org:Charity Number column that doesn't look like a UK charity number.**

If you get this kind of error message, you will get a similar error message about your Recipient Org:Identifier data, because these are created based on the charity/company numbers - **XX grants have a Funding or Recipient Organisation identifier that might not be valid.**

To fix these issues, focus on cleaning the data in your system's charity or company number field and exporting your 360Giving data again. The Appendix includes further guidance on formatting UK charity and company numbers.

Inverted start and end dates

If you have a minus duration error in the Validity section, you will probably also get feedback that the start and end dates are inverted.

Resolving the validity issues by correcting the dates and exporting your 360Giving data again will fix this issue too.

Usefulness

This feedback highlights ways to improve the usefulness of your data.

Feedback you can ignore

The feedback your data receives in this section is influenced by the way the D2 export tool was originally configured, so you can ignore the following pieces of feedback:

- **100% of grants do not have recipient organisation location information**
- **100% of grants do not have Data Source information**

Your data has Beneficiary location rather than Recipient location information. When the D2 tool was being configured, the decision was made not to include postcode data because of privacy concerns for grassroots organisations that might provide a home address in their applications.

Feedback to check, but may need no action

- **XX of grants have a Recipient Org:Identifier that starts '360G-'**
- **XX of grants do not have either a Recipient Org:Company Number or a Recipient Org:Charity Number**

This feedback is to be expected because if an organisation doesn't have a charity or company number, the D2 system creates an 'internal ID' based on the D2 account ID, and adds a 360Giving publisher prefix which starts **360G-**.

If your grant recipients include small and unregistered groups, there may be a good proportion that don't have a charity or company number at all. This means that you only need to investigate your data further if there is a big difference between the percentages of these two pieces of feedback, or the percentage is higher than you would expect for the proportion of registered vs unregistered organisations that you fund.

Please note: If you remove any optional or recommended field from your data, as set out in the Appendix, this might trigger other 'Usefulness' feedback, which you can also ignore if you have opted not to include this data.

Publishing your data

Once you are happy with your data file and the Data Quality Checker shows that the data is valid, the next step is to publish the file online.

To find out more, follow the guidance in Stage 3. Publish.

Get support

If you can't find the answer you're looking for in our guidance, email our Helpdesk at support@threesixtygiving.org or check out other ways to [get in touch](#).

Appendix

D2 Export Column Title	Status	Notes
Identifier	Required	<ul style="list-style-type: none"> The unique identifier for the grant, created from the Application reference from your system with your 360Giving publisher prefix.
Title	Required	<ul style="list-style-type: none"> If there is no title text available, this will default to 'Grant to Recipient Name'.
Description	Required	<ul style="list-style-type: none"> If there is no description text available, this will default to 'Grant to Recipient Name'. Description text is populated from the DQ field 'Project description – summary'. The text needs checking for personal data or internal comments prior to publishing.
Currency	Required	<ul style="list-style-type: none"> The currency code for British Pounds
Amount Applied For	Optional	<ul style="list-style-type: none"> The grant amount the applicant applied for
Amount Awarded	Required	<ul style="list-style-type: none"> This is the whole value of the grant agreed upon when awarded. This means if it is a multi-year grant, it is the entire amount, not the per-year payment.
Award Date	Required	<ul style="list-style-type: none"> The date when the grant was agreed upon.
Planned Dates:Start Date	Recommended	<ul style="list-style-type: none"> If the start date has typos, incorrect dates, or the end date has been put in the start date field by mistake, this will create issues in the Planned Dates:Duration (months) field
Planned Dates:End Date	Recommended	<ul style="list-style-type: none"> If the end date has typos, incorrect dates or the start date has been put in the end date field by mistake, this will create issues in the Planned Dates:Duration (months) field
Last modified	Recommended	<ul style="list-style-type: none"> This is the date the grant record was last modified in your system.

Planned Dates:Duration (months)	Recommended	<ul style="list-style-type: none"> • The data in this field represents the duration of the grant in whole months. • The data is calculated from the start and end dates. This means that if the start and end dates have typos, incorrect dates or the start and end dates are swapped around, a minus duration is created. It is possible for a grant duration to be 0 if the period between the start and end date is less than one month.
Recipient Org:Identifier	Required	<ul style="list-style-type: none"> • The unique identifier for the grant recipient. If there is a charity or company number provided in the Charity or Company number fields, the Recipient Org:Identifier will be created using this data. • If there is no charity or company number available, the Recipient Org:Identifier will be created using the Account reference from your system with your 360Giving publisher prefix. • If there are issues with the data quality of information provided in the charity or company number fields, the issues will also appear in the Recipient Org:Identifier data.
Recipient Org:Name	Required	<ul style="list-style-type: none"> • The name of the recipient. If the recipient is an individual, and the grant type is for an individual, the name will be automatically changed to 'Individual Recipient'. • If you would like to include grants to individuals in your 360Giving data, contact the 360Giving Helpdesk via support@threesixtygiving.org to discuss the best approach.
Recipient Org:Charity Number	Recommended	<ul style="list-style-type: none"> • Charity numbers provide valuable information about the recipient and should be collected whenever possible. • Only charity numbers should be stored in this field. Filler text, such as N/A, applying for registration or text before and after the charity number such as CN or No. should be cleaned from the data to ensure only the charity number remains. • Only one charity number can be included in each field, so if an applicant has added two charity numbers (eg because it is registered in England & Wales and Scotland), remove one. • The correct formatting for UK charities is as follows: Registered Charities in England and

		Wales have charity numbers that are either seven digits long, starting with 1, or six digits long, starting with any number apart from 1. Scottish charity numbers are eight digits long and start with SC0 followed by five digits. Northern Ireland charity numbers are six digits and all start with 1.
Recipient Org:Company Number	Recommended	<ul style="list-style-type: none"> • Company numbers provide very useful information about the recipient. • If the recipient is also a registered charity, the company number doesn't also have to be collected, however for any non-profit companies or social enterprises, this data should be collected whenever possible. • Only company numbers should be stored in this field. • Filler text, such as N/A, applying for registration or text before and after the company number such as No. should be cleaned from the data to ensure only the charity number remains. • Only one company number must be included in each field, so if an applicant has added extra information this needs to be cleaned. • UK company numbers are 8 characters long, with most starting with a 0, although some can start with letter prefix or number 1.
Recipient Org:Description	Optional	<ul style="list-style-type: none"> • This text is taken from the D2 'Purpose of Organisation' field. • The recipient description provides useful additional information; however, the text provided is often lengthy and can have data quality issues or include the names of people involved in the organisation. As cleaning the data to get ready for publication can be time consuming, some CFs remove this field prior to publishing the data.
Recipient Org:Web Address	Optional	<ul style="list-style-type: none"> • Look out for text that isn't a website address, such as emails, 'under construction' or N/A. • The Data Quality Checker will highlight the presence of email addresses because they can include people's names. If emails are filled into the website field, these should be removed prior to publishing. The entire field can be removed from the data that is published if necessary.

Beneficiary Location:Name	Recommended	<ul style="list-style-type: none"> Data extracted from the D2 system includes 'Beneficiary' location information, based on the 'Project Postcode' provided by applicants. These fields provide useful data about where your grants go.
Beneficiary Location:Country Code	Optional	<ul style="list-style-type: none"> Data extracted from the D2 system includes 'Beneficiary' location information, based on the 'Project Postcode' provided by applicants. These fields provide useful data about where your grants go.
Beneficiary Location:Geographic Code	Recommended	<ul style="list-style-type: none"> Data extracted from the D2 system includes 'Beneficiary' location information, based on the 'Project Postcode' provided by applicants. These fields provide useful data about where your grants go.
Beneficiary Location:Geographic Code Type	Optional	<ul style="list-style-type: none"> Data extracted from the D2 system includes 'Beneficiary' location information, based on the 'Project Postcode' provided by applicants.
Funding Org:Identifier	Required	<ul style="list-style-type: none"> The unique identifier for your organisation – this is based on your charity number.
Funding Org:Name	Required	<ul style="list-style-type: none"> The name of your organisation
Grant Programme:Code	Optional	<ul style="list-style-type: none"> The code that goes with the grant programme name.
Grant Programme:Title	Recommended	<ul style="list-style-type: none"> The name of the grant programme. If a grant programme includes the name of a donor that needs to be anonymous, the D2 system has a way to change the programme title to 'Undisclosed'
<p>The following fields are not part of the 360Giving Data Standard. It is possible to publish this data; however, if the information has gaps or is inconsistent, this field can be removed prior to publishing:</p> <ul style="list-style-type: none"> Impact Category, Primary beneficiary, Primary issue, Primary ethnicity, Primary age group 		