

Data preparation guide for community foundations

Overview

In collaboration with UKCF, 360Giving has supported the development of a tool for the Digits2 (D2) system which means that grant information can be extracted from your system ready-formatted to the 360Giving Data Standard.

Community foundations participating in a pilot were consulted to agree 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 D2 system means that the technical aspects of preparing your data will be automated, making the process easier and quicker. 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.

Below there is specific step-by-step guidance for community foundations using the D2 tool, and links to other relevant guidance found on this site.

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.

See the guidance on [deciding the scope of your data](#) for further details.

What to consider if you make grants to individuals

The D2 360Giving extract tool automatically anonymises the names of individuals who have received grant awards. The beneficiary location for individual grant awards is shared at local District or Ward level.

The D2 extract anonymises the names of individuals, however extra care should be taken to check other fields in the grant data, such as Title, Description and Recipient Org:Description, as well as Beneficiary fields, to ensure that this information, on its own or when combined, cannot be used to identify the individual concerned.

If you take further steps to anonymise or remove potentially identifying data make a note of the changes you make, and ensure these checks and steps are taken each time you publish new data.

See the guidance on [data protection](#) to consider the implications for your organisation of sharing open grants data.

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'.

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.

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

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. 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.

Walk-through video

[Watch the video walk-through](#) to get an overview of the process and follow the instructions below to export 360Giving data from your D2 system.

The source report

A dedicated report folder is created for each community foundation containing the template report that is 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.

The screenshot shows the 'Reports & Dashboards' section of the 360Giving interface. The navigation menu at the top includes 'Home', 'Chatter', 'Campaigns', 'Accounts', 'Opportunities', 'Reports' (which is highlighted), and 'Dashboards'. Below the navigation, the main heading is 'Reports & Dashboards' with two buttons: 'New Report...' and 'New Dashboard...'. On the left side, there is a 'Folders' sidebar with a search bar containing '360' and a folder icon for 'OxfordshireCF - 360 Giving Reports'. The main content area is titled 'OxfordshireCF - 360 Giving Reports' and features a search bar 'Find reports and dashboards...'. Below the search bar is a table with two columns: 'Action' and 'Name'. The table contains one entry: a dropdown arrow in the 'Action' column and 'OCF 360 Giving Test 2017' in the 'Name' column, with a subtitle 'All Awarded Grants in 2017 for testing'.

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 360Giving field specification.

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
a061600000k0290	A409392	Contained project focussed on changing perceptions of migration	£5,000.00

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 in to the report, they will NOT be included in the grant extract file but can be included for checking purposes
- Individual grant recipient names will appear in the report, but these will default to 'Individual recipient' in the extract file if they are a Person Account instead of an organization.
- If project name is blank, then the output will default to 'Grant to org name' – if it is person 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 organization 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 or 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

Undisclosed programme

If you do not want to publish the name of specific Programmes, there are 2 new fields in the 360 Giving 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

Generating the file

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

This can be added to the tabs across the top menu bar (by accessing customise my tabs via + 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	<input type="text" value="OCF 360 Giving Test 2017 - 2017-05-18 10:25:55"/>

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: the file may take longer to open if there are a large number of records in the file so you may need to be patient.

Open the excel file to review 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 data quality and receive feedback

Once you have exported a file of your data using the 360Giving extract, the next step is to check that the data is valid. Valid data means the file includes all the required fields and the information has the correct formatting.

Each Community Foundation is responsible for the data it publishes. You can check that your data is valid using this Data Quality Tool developed, which will tell you if there are any issues with your dataset.

Click Next below to read our guidance on checking data quality before publishing your data.

Publishing your 360Giving data

Once you are happy with your data file and the Data Quality tool shows that the data is valid, the next step is to find a place on your website for hosting the file and outlining the open license you are releasing it under.

All organisations publishing data to the 360Giving Standard host their files on their own website, which means they have control over and are responsible for their data.

See the guidance on [publishing your data openly](#) for further details.

Getting further help

This guidance aims to support funders through the 360Giving publishing process. If you can't find the information you need or you have further questions email [360Giving Helpdesk](#). You can help us improve this guidance by filling out our [feedback form](#).