
Publishing Grants using 360Giving Documentation

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360Giving

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So, your organisation has decided to publish its grants using the 360Giving standard. That's great! You've taken a big step to help make grantmaking even more impactful with open data.

If you're a community foundation who uses Salesforce, see our *guide*

Already published and looking for guidance on how to make your published data even better? Check out *our guidance*

Here's what the journey looks like from here:

- Getting started: understand the 360Giving standard, learn about how other organisations have published, and find out where to get support
- Concept Mapping: Look at the data that you have in your organisation, and how it can be represented using the 360Giving Standard
- Publication Policy: Develop a policy for your organisation about what to publish, and how often
- Data Use: Discover ways in which your data can help your organisation improve, especially when combined with data from elsewhere
- Initial Data: Create a small, sample data file and assess it using the Data Quality Tool
- Improve Data: Building on feedback from the DQT, fix any issues and add additional data that you want to publish. You'll do this several times, as your data improves
- Publish: Find an appropriate place on your website to publish the file, and upload it

Contents:

CHAPTER 1

Getting Started

The first step is to take some time to read about what you're about to start on. Read *the introduction to the 360Giving Standard*, and check out *these stories of how a range of organisations published using 360Giving* on the blog. And, if you haven't already, get in touch with the Helpdesk to let us know that you're thinking of publishing, and to get your prefix (you'll need this shortly).

Concept Mapping

Concept mapping is the process of correlating the data that you have in your organisation with the 360Giving Standard. It's usually quite straightforward, and is an important step in making sure that your publication is useful.

First, get hold of all the data that you can that you hold in your organisation that relates to the grants that you make. You don't need historic data or the very latest data at this point, but it's important to know where data is available, and where to get it from. In a small organisation, this could be as simple as knowing who has the spreadsheet, or what you can download from Salesforce. In a large organisation, you might need to combine data from several sources.

Then, download the *concept mapping template*. This explains what each part of the 360Giving standard is for, and to what extent it's part of the minimum requirements.

Once you've got those, you're ready to get started! Working whichever way round you prefer, see where the data that you can represent in the standard exists in your data.

Most organisations don't have all the data to publish using the entire standard, and not all parts of the standard are relevant to all organisations, so the goal here isn't to have a full card - it's to help you understand how your data and the standard relate.

You'll probably come back to this document several times as you get a better understanding of both your own data and the standard, so don't worry about making it perfect yet.

If you're not sure what this looks like in practice, read *Laura's Story* on the blog. If you need any help, contact the Helpdesk!

CHAPTER 3

Publication Policy

You'll need to decide what to publish.

TODO: talk about how this decision is made!

TODO: add something that's a good link target from CoVE text about missing fields

CHAPTER 4

Data Use

TODO: write something about how using your own data is good for the soul

Initial Data

We recommend an iterative approach to preparing data for publication - pull together a small file of 10-100 grants and just the 360Giving minimum fields, and then adding some more data each time, so that the work to do each iteration is manageable.

In order to prepare your initial data, download the *spreadsheet template* and have the *standard documentation* to hand. This is where details matter - in order for your data to use the standard, you need to be exact in matching the requirements of the standard with your data. Capitalisation, formats and errant spaces matter here!

For each of the fields that you're planning to publish, work out how to make the data that you've got fit into the standard template. Make notes of anything that you do - for example, if you have to reformat a date or separate out a value field into an amount and a currency. These notes will form the basis of any publication process or data storage changes that you might make.

Once you've prepared your initial data, upload it to the *Data Quality Tool*. The DQT brings together structural checks on the standard that affect technical interoperability of your data with the experience of the 360Giving team to make recommendations of how you can improve your data. This will give you feedback on your data, including how well it uses the 360Giving standard, and suggestions for improvements. For now, you're mostly interested in validation results, although the quality checks will also give you helpful insight into how your data can be improved, as well as areas that it's already doing well in.

CHAPTER 6

Improve Data

Once you've got an initial data file that uses the 360Giving standard, it's time to improve. We find that publishers find the process much easier if they take improvement one step at a time, adding to their data and fixing issues as they go.

TODO: add advocacy as to why better data is worth the time effort

TODO: add links to blog posts etc about why it's good to do

CHAPTER 7

Publish

Once you're happy with your first data file, it's time to publish it on your website. Remember that your 360Giving data is part of your communications - it's a way of telling the world about all the good that your organisation does!

There's a few things to consider when choosing where to host your 360Giving data files: - Will the addresses change if you make an update? Some blog platforms (eg Wordpress) use the date of upload in the address, so this will change every time you add to or correct your file - Can you make changes in accordance with your publication policy? Most organisations will want to publish their grants on a certain schedule, so you should make sure that the changes can be applied in line with that schedule - Are there any restrictions on the download? It should be possible for a data user to download the data via a link from the Registry directly

CHAPTER 8

Indices and tables

- `genindex`
- `modindex`
- `search`