Field Guide: Totals Table

COLUMN LABEL	DEFINITION
Color Key: ☐ User-Given ☐ Charitable ☐ Wealth ☐ DonorSearch	
BASIC INFORMATION	
First Name	UG-Prospect First Name
Middle Name	UG-Prospect Middle Name
Last Name	UG-Prospect Last Name
SP-First	UG-Prospect *Spouse* First Name
SP-Middle	UG-Prospect *Spouse* Middle Name
SP-Last	UG-Prospect *Spouse* Last Name
Age	UG-Age
Date of Birth	UG-Date of Birth
Address	UG-First line of mailing address
Address 2	UG-Second line of mailing address (if needed)
City	UG-Mailing address City
State	UG-Mailing address State
Zip	UG-Mailing address Zip/Postal Code
Phone Number	UG-Phone number
Email	UG-Email
USER-GIVEN	
Last Gift Date	UG-Date of *Last* Gift to user organization
Total Gift Amount	UG-*Total Amount* of prospect's giving to user organization
# Of Gifts	UG- *Number* of gifts made by prospect to user organization
ID	UG – User's CRM record ID/Assigned Unique identifier
Notes	UG-Any Notes added to the individual profile will be visible here.
Largest Gift Amount	UG-*Amount* of Largest Gift to user organization
Largest Gift Date	UG-*Date* of Largest Gift to user organization
Last Gift Amount	UG – *Amount* of Last Gift to user organization
First Date Range	UG-*Date* of the prospect's *First* gift to the user organization
First Gift Amount	UG-*Amount* of the prospect's *First* gift to the user organization
UG- 1-20	Data you include in your screening file *and* add when you edit individual profiles. Use the columns for strategic data to refine the list & prioritize action.
Prefix	UG-Prefix, or Salutation (e.g., Hon., Mr., Mrs., etc.)
Suffix	UG-Suffix (e.g., Jr., III, Esq., etc.)

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COLUMN LABEL	DEFINITION
DONORSEARCH SPECIFIC	
DS Rating (DS1-1, DS1-2, etc.)	DonorSearch philanthropic and/or wealth ranking of the prospect's major gift capacity.
Quality Score (0-25)	The average of the high-quality matches in found in the profile
Profile (View)	Link to the prospect's complete wealth & philanthropic profile
RFM Total (1-300)	Total Loyalty/Affinity Score (Recency, Frequency, Money)
Date Searched	UG-Date of Screening/Research
Assessed (Y/N)	Indicates if DonorSearch research team has manually verified the data in the profile.
Assessment Questions	Details any assumptions made in data verification (e.g., 'assumed middle initial was C.')
Estimated Capacity	Estimated 5-year (pledge) giving capacity based on visible wealth
Annual Fund Likelihood (1-300)	Prospect's likelihood of making an annual commitment, based on a combination of external and internal giving behavior.
Major Gift Likelihood (1-300)	Prospect's likelihood of making a major gift, based upon internal and external giving history.
PGID (1-7)	Prospect's likelihood of making a planned gift based on internal giving data. 1 = Most Likely; 6 = Least Likely; 7 = Unable to Rate. *At least 12-15 years of giving data is needed to calculate a score.*
VIP Match	Count of flags indicating *known* connections identified in screening. Users provide lists of key volunteers, donors, etc. prior to file submission. *Most often used by Healthcare and Arts organizations for incoming patients and patrons.*
Inner Circle	Count of flags indicating *known* connections identified in screening. Users provide lists of key volunteers, donors, etc. prior to file submission.
RFM Recent Gift (1-100)	Portion of Affinity Score based on *recency* of giving
RFM Frequency (1-100)	Portion of Affinity Score based on *frequency* (number of transactions) of giving
RFM Money (1-100)	Portion of Affinity Score based on **total amount** of giving
Classic Quality Score	Average of quality scores *across all matches* found in profile
INTELLIGENT INSIGHTS – *Populated with purchase of screening & Intelligent Insights modeling*	
Retention Rank	Retention rank compared to other prospects in the list
Acquisition Rank	Acquisition rank compared to other prospects in the list
Upgrade Rank	Upgrade rank compared to other prospects in the list
Lifetime Value Rank	Lifetime Value rank compared to other prospects in the list
Retention Score	Retention Score (1- Best, 2- Better, 3- Good, 4- Can't Rate)
Acquisition Score	Acquisition Score (1- Best, 2- Better, 3- Good, 4- Can't Rate)
Upgrade Score	Upgrade Score (1- Best, 2- Better, 3- Good, 4- Can't Rate)
Lifetime Value Score	Lifetime Value Score (1- Best, 2- Better, 3- Good, 4- Can't Rate)

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COLUMN LABEL	DEFINITION
GIVING DATA*	
Total of Likely Matches	Total dollar amount of all *high quality* charitable gifts found in the profile. *Does not include 'maybe' donations or 'low quality' matches.*
# of Gift Matches	Total number of *high quality* individual gift transactions
Foundation (Y/N/M)	Indicates if prospect is on the board of a Foundation
Fnd Assets	The total 'assets' listed by the foundation
NonProfit (Y/N/M)	Indicates if prospect is associated with a *grant-receiving* foundation.
IRS 990 PF (Y/N)	Indicates if a private foundation has filed a 990 w/IRS
IRS PUB78 (Y/N)	Indicates if org is listed with the IRS as 'tax deductible'.
Political Count	Count of *high quality* political contributions (federal & state)
Political Total	Total dollar amount for *high quality* political contributions
Maybe Total	Total dollar amount of *all* political contributions (including *low quality* matches)
Largest Gift Found	Upper range of largest external gift amount found in annual report or FEC documents. *Amounts ending in '1' (e.g., $25,001) are that amount or more. '$0' = No $$ amount published. $5K+ higher are in* darker blue.
Largest Gift Found Lower Range	Lower range of largest external gift amount found in annual report or FEC documents. This number will be the **Target Ask Based on Giving** in profile.
See bottom of guide for non-profit organizational categories.	
FOUNDATION INFORMATION	
Grant-Giving Fdn. Year	Year of record
Grant-Giving Fdn. EIN	Foundation's Employer Identification No. – Nonprofit Category
Grant-Giving Fdn. Title	Prospect's position title at the Foundation
Grant-Giving Fdn. Org. Name	Name of foundation
Grant-Giving Fdn. Assets B.O.Y.	Value of assets at the *beginning* of published year
Grant-Giving Fdn. Assets E.O.Y.	Value of assets at the *end* of published year
Grant-Giving Fdn. Grants Paid (Year)	Value of Grants given in published year
Grant-Giving Fdn. Grants Approved (Year)	Value of Grants approved in published year
Grant-Giving Fdn. Grants to Individuals (Ct.)	Number of Grants given to individual recipients
Grant-Giving Fdn. Grants to Orgs. (Count)	Number of Grants given to organizations
Grant-Seeking Fdn. Organization Name	Name of foundation
Grant-Seeking Fdn. Organization Year	Year of published report
Grant-Seeking Fdn. Organization EIN	Foundation's Employer Identification No. – Nonprofit Category
Grant-Seeking Fdn. Title	Prospect's position title at the Foundation
Grant-Seeking Fdn. Type	Type of organization
Grant-Seeking Fdn. Gross Receipts	Total receipts
Grant-Seeking Fdn. Total Emp. Count	# of Employees at the organization
Grant-Seeking Fdn. Total Volunteer Count	# of Volunteers at the organization
Grant-Seeking Fdn. Total Assets B.O.Y.	Value of assets at the *beginning* of published year
Grant-Seeking Fdn. Total Assets E.O.Y.	Value of assets at the *end* of published year
Grant-Seeking Fdn. Total Contributions	Total Reported Contributions by the organization

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COLUMN LABEL	DEFINITION
WEALTH-BASED FIELDS	
Wealth-Based Capacity	Estimated 5-year giving capacity based on wealth data *only*. This number will be the Target Ask Based on Wealth in profile.
WealthX – Match Count	Number of High Quality Matches
WealthX – First	First [Name]
WealthX – Middle	Middle [Name]
WealthX – Last	Last [Name]
WealthX – Suffix	[Name] Suffix (i.e., Jr., III, Esq.)
WealthX - Ranking	Category of Confirmed Wealth (e.g., Ultra-High NW)
WealthX – Range	Net Worth [$$] Range
WealthX – Net Worth Lower Est.	Net Worth Lower [$$] Estimate
WealthX – Net Worth Upper Est.	Net Worth Upper [$$] Estimate
Real Estate Est.	Value of all properties matched. *Higher values are highlighted in darker green.*
# Of Prop(erties)	Number of individual properties matched to the prospect
Real Estate Trust (Y/N/M)	Indicates if any matched properties are listed in a Trust.
# of ST w/Prop(erties)	Number of states where matched properties are located.
SEC Stock or Insider (Y/N)	Prospect is SEC Insider (director/officer of publicly traded co. (NYSE/NASDAQ).
SEC Stock Value	Market value of reported stock holdings of SEC Insider
Business Revenue	Total Revenues of *high quality* matches found in the profile.
Business Affiliation (Y/N/M)	Indicates if the prospect is listed as a business decision-maker/owner.
Average Home Value	Average property values for zip code of prospect's residence.
Median Household Income	Median Household Income for zip code of prospect's residence.
FAA Pilots (Y/N/M)	Indicates if the prospect holds a pilot's license
Airplane Owner (Y/N/M)	Indicates if the prospect has an aircraft
Boat Owner (Y/N/M)	Indicates if Coast Guard lists the prospect as a boat owner.
Shale Wealth	Indicates $ amt./sq. ft. paid by shale oil companies leasing mineral rights.
BUSINESS DATA	
DBUSA Executive First	First Name
DBUSA Executive Middle	Middle Name
DBUSA Executive Last	Last Name
DBUSA Executive Title	Title (usually company officer)
DBUSA Executive Email	Business email address
DBUSA Company Name	Company
DBUSA Employee Count	Employee Count
DBUSA Co. SIC Code	Standard Industry Code (what the business does/produces)
DBUSA Co. SIC Description	Standard Industry Code spelled out description
DBUSA Co. Sales Total	Sales/Revenues
Open Corporate – Co. Name	Company name
Open Corporate – Co. Type	Type of Company (if supplied by Client at screening)
Open Corporate – Inc. Date	Company's date of incorporation
Open Corporate – Dissolution Date	Company's date of dissolution
Open Corporate – Emp. Start Date	Prospect's employment start date
Open Corporate – Emp. End Date	Prospect's employment end date
Open Corporate – Position	Prospect's Position Title
Open Corporate – Occupation	Prospect's Occupation

Field Guide to NonProfit Organizational Categories – *These columns provide detailed information regarding the prospect's identified philanthropy by each recipient organization's nonprofit category/sector.*

COLUMN LABEL	DEFINITION
Higher Education Count	Count of gifts to Higher Education
Higher Education Total	Total Amount given to Higher Education
Education Gift Count	Count of gifts to Education (e.g., K-12, other education)
Education Total	Total Amount given to Education
Philanthropy and Grant Making Count	Count of gifts to Philanthropy & Grant Making
Philanthropy and Grant Making Total	Total Amount given to Philanthropy & Grant Making
Healthcare Count	Count of gifts to Healthcare
Healthcare Total	Total Amount given to Healthcare
Arts Gift Count	Count of gifts to Arts Organizations
Arts Gift Total	Total Amount given to Arts Organizations
Republican Gift Count	Count of gifts to Republican candidates
Republican Gift Total	Total Amount given to Republican candidates
Democratic Gift Count	Count of gifts to Democratic candidates
Democratic Gift Total	Total Amount given to Democratic candidates
Other Political Count	Count of gifts to other political causes
Other Political Total	Total Amount given to other political causes
Religion Count	Count of gifts to Religion
Religion Total	Total Amount given to Religion
Society Benefit Count	Count of gifts to Society Benefit
Society Benefit Total	Total Amount given to Society Benefit

Field Guide to Marketing List Data Points – *These columns include demographic, household, and financial position data points from the DonorSearch Marketing List database.*

COLUMN LABEL	DEFINITION
ML-Match Full Name	Full Name in demographic file
ML-Match Address	Full Address in demographic file
ML-State	State of residence
ML-Zip	Zip code of residence
ML-Age Range	Age Range
ML-Exact Age	Exact Age
ML-DOB Month	Month of Birth
ML-DOB Year	Year of Birth
ML-Home Value Donor Capacity	Home Value
ML-Gender	Gender
ML-Home Assessed Value	Assessed Value of Current Residence
ML-Home Equity Available	Estimated Home Equity Available
ML-Home Purchase Year	Year home was purchased
ML-Home Square Footage	Estimated Square footage of residence
ML-Home Value Description	
ML-Investment Properties Owned	# of Investment properties owned
ML-Length of Residence	Est. # of Years in current residence
ML-Median Home Value	Median Home Value of Zip Code
ML-Median Household Income of Zip Code	Median Household Income of Zip Code
ML-Net Worth	Estimated Net Worth
ML-Net Worth Description	
ML-Number of Children	# of Children in the household
ML-Number of Adults	# of Adults in the household

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ML-Unsecured Credit Capacity	Unsecured Credit Capacity
ML-Vehicle Owned	# of Vehicles owned by members of the household
ML-Number of Bedrooms	# of bedrooms in residence
ML-Number of Bathrooms	# of bathrooms in residence

Field Data in Screenings processed *prior to 2016. Blank if screened after 2016.*

COLUMN LABEL	DEFINITION
Market Guide	Indicates if prospect is listed in Reuters Market Guide.
Market Guide Comp	Dollar value of prospect compensation as listed in Market Guide.
Market Guide Options	Dollar value of executed stock options as listed in Market Guide.
Pension Admin	Indicates if a pension plan has been matched to prospect.
Pension Assets	Total dollar value of assets in matched pension
Corp Tech (Y/N)	Indicates if the prospect is profiled in CorpTech database.
Zestimate Total	Zillow value of real estate.
Zestimate Count	Zillow count of real estate.
LN Total	LexisNexis value of real estate.
LN Count	LexisNexis count of real estate. B*lank if screened after 2016*
Who's Who (Y/N)	Indicates if the prospect is profiled in Marquis' *Who's Who.*